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ABSTRACT

Included in this annotated bibliography on planning and management of human services are forty-three books and reports selected from the collection of the National Clearinghouse for Improving the Management of Human Services (Project SHARE). Some citations are for documents produced by numerous integrated planning and demonstration projects at both state and local levels which were funded by the U.S. Department of Health, Education, and Welfare. Others are texts selected because they elucidate the more generic issues of long-range planning, social policy formulation, respective governmental planning roles and policies, and operational planning topics. Each citation contains title, author and/or institutional source, publication date, number of pages, and an abstract, along with price and availability information for microfiche and/or paper copy. Some representative titles are as follows: (1) Alternative Approaches to Human Services Planning: Nine Case Studies on Human Services Planning in State, Regional, and Local Organizations; (2) Clusters as a Planning and Coordinating Device in Human Services; and (3) Development of a Conceptual Approach to Strategic Health Planning: Final Report. (JT)

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Integrated Human Service Planning

During the past five years, many State and local governments have been reorganizing their human service administrative structures to resemble umbrella-type agencies or their equivalents. Many of these agencies and some governmental units which have not reorganized have begun a comprehensive examination of their human service planning activities.

The Department of Health, Education, and Welfare has looked upon this movement as an opportunity to discern which of many planning approaches can most readily assist the resource allocation process. In the last few years the Department has, therefore, funded numerous integrated planning demonstration projects at both State and local levels.

This bibliography includes references to many of the documents produced by those demonstrations. Also included are texts which elucidate the more generic issues of long-range planning, social policy formulation, respective governmental planning roles and policies, and operational planning topics.

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Gerald T. Horton and Edmund H. Armentrout. Research Group, Inc., Atlanta, Ga.

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Administration of Urban Services.

Chattanooga-Hamilton County Community Action Agency, Chattanooga, Tenn. Neighborhood Services Program.
May 73, 52p
PB-222 798 Available from NTIS, PC$5.25/MF$3.00.

The Chattanooga, Tennessee experience in carrying out the objectives of the Pilot Neighborhood Services Program (NSP) is documented. The program was designed to bring together the resources of five Federal agencies in a concerted attack on inner-city poverty. The concept of coordination of services was central to the program and one of the main objectives of the NSP was the development of a system of coordination. The structure of the coordination mechanism developed in Chattanooga is discussed in detail, as is the development of a planning system for NSP agency activities. Development and implementation of the program's information system is also discussed. An assessment of the NSP reveals that the system's primary advantage is that it allows personnel at various levels to function in the coordination process. The development of the coordination process had a beneficial effect on the work necessary to accomplish planning and information system activities. In the development of such systems several crises had to be overcome: involved agencies had to be convinced of the need for establishment of formal systems, persons participating in the systems had to play a role in the development process, and technical expertise needed to be developed. A coordination system model for the delivery of urban services is developed. Portions of this document are not fully legible.

Alameda County Pilot Project on Human Services Planning. Final Report.

Arthur Young and Company, Oakland.
Apr 76, 77p
SHR-0000988 Available from NTIS, PC$6.00/MF$3.00.

The final report is presented of a project to provide technical assistance for human service planning to the Human Services Council of Alameda County, California by the County Supervisors Association of California (CSAC). Background information is provided on the Human Services Council, on the CSAC's participation in human services planning and in the Alameda County project, and on the status of the planning process in Alameda County. A description of a model planning process is based on a review of the literature, implemented planning processes in other locations, consultants' experiences with planning and needs assessment, and familiarity with Alameda County. Steps in the planning process model include: specify parameters of the planning process, assess the existing situation, assess and evaluate needs, develop program alternatives, select programs and develop implementation strategies, and monitor and evaluate programs. A method for planning for social services is suggested, and a review is provided of the method used in developing Title XX of the Social Security Act needs assessments. An annotated bibliography of human services planning is included.

Alternative Approaches to Human Services Planning. Nine Case Studies on Human Services Planning in State, Regional, and Local Organizations.

Joan Hutchinson Miller and Gerald T. Horton.
Human Services Inst. for Children and Families, Inc., Arlington, Va.
Nov 74, 139p Executive Summary available from PROJECT SHARE .
SHR-0000125 Available from PROJECT SHARE, PC$6.00.

Nine case studies of human services planning are presented as examples of comprehensive planning at the State, local, and regional level. These case studies do not describe model human services planning systems; they were chosen because they document different types of planning systems at various government levels. Three specific approaches to human services planning

are identified: project or operations planning, program planning, and policy planning. Planning functions are located in independent agencies, staff agencies or in line operations, and each of the case study organizations contains an element for some form of citizen participation. Professional staffs can be characterized as having one of three technical approaches to human service planning: systems analysis/operations research, social welfare, or public administration. Funding comes from all levels of government, but the Federal government provides the bulk of the funding. At the State level the organizations studied are: the State of Arizona Department of Economic Security, the State of Florida Department of Health and Rehabilitative Services, and the State of Georgia Department of Human Resources. Regional organizations studied are the Alamo Area Council of Government San Antonio, Texas; Upper Cumberland Development District of Cookeville, Tennessee; and Metropolitan Council of the Turin Cities Area, Minnesota. Local Governments are the City of Chattanooga, Tennessee, City of Norfolk, Virginia, and Lancaster County, Pennsylvania. Portions of this document are not fully legible.

Alternative Approaches to Program Development in Social Services Planning. State Experiences and Suggested Approaches in Response to Title XX of the Social Security Act.

Research Group, Inc., Atlanta, Ga.
Nov 76, 69p
SHR-0001633 Available from Research Group, Inc., 1230 Healey Bldg., 57 Forsyth St., NW, Atlanta, GA 30303.

The role of program development in the Title XX planning process is explored. Techniques and approaches for the development of social service programs through a comprehensive social service planning process are described. The experience of eight States in the administration of Title XX is examined: Massachusetts, Minnesota, Nevada, New Jersery, North Dakota, Oklahoma, Texas, and Washington. Program development, the process by which States define alternative approaches and assign funds to meet service needs, is considered to be a crucial step in the social service planning process. Five activities of program development are detailed: (1) selection and definition of services to be provided; (2) selection of service providers; (3) determination of geographic services areas; (4) determination of eligibility requirements for services; and (5) use of fees for services. Steps in program development are outlined, and forms and procedures are included for program development in the five activity areas. It is concluded that program development requires a high degree of management expertise. Examples from the eight States are used to describe various techniques for program development.

Alternative Approaches to Program Planning Coordination in Social Services Planning. State Experiences and Suggested Approaches in Response to Title XX of the Social Security Act.

Gerald T. Horton and George J. Corcoran.
Research Group, Inc., Atlanta, Ga.
Aug 76, 44p
SHR-0001557 Available from Research Group, Inc., 1230 Healey Bldg., 57 Forsyth St., NW, Atlanta, GA 30303.

Guidelines for program planning coordination are presented in one of a series of manuals covering the social services planning process under Title XX of the Social Security Act. The manual, which is based largely on case studies of the Title XX planning process in eight States, opens with a description of that process and of the role of program coordination within the process. The opening discussion describes what program planning coordination is, why it is necessary, and how it fits into the overall planning process. The experiences of the eight case study States in the area of coordination are reviewed briefly, and an approach to program planning coordination is presented. A series of tasks is set forth to address questions concerning with whom the State should coordinate, how the State should administer the coordinated planning activity, what planning activities should be coordinated, and how coordina-

tion is carried out. Alternative approaches to coordination are suggested for each planning activity (e.g., needs assessment, services inventory). The practices and experiences of the eight case study States are discussed relative to each alternative. Finally, an overall approach to program planning coordination is described, including steps to be taken, format and use of instruments, techniques for analysis of results, and format and use of results.

Alternative Approaches to the Organization and Staffing for Social Services Planning. State Experiences and Suggested Approaches in Response to Title XX of the Social Security Act.

Gerald T. Horton and Victoria M. Carr.
Research Group, Inc., Atlanta, Ga.
Aug 76, 66p
SHR-0001558 Available from Research Group, Inc., 1230 Healey Bldg., 57 Forsyth St., NW, Atlanta, GA 30303.

Alternative organizational and staffing approaches for social services planning under Title XX of the Social Security Act are presented in one of a series of technical manuals based in part on eight case studies of State experiences under Title XX. The manual opens with an explanation of the relationship of organization and staffing to other activities in the Title XX planning process. The characteristics, benefits, and limitations of organizational approaches taken by the eight case study States are pointed out. These approaches include the Statewide planning agency, and the departmental level planning unit, the organized planning unit within the primary social services division of the designated Title XX agency, the ad hoc planning unit or task force, and combined approaches using agency or section level planning units and task forces. Illustrations of each approach, including organizational diagrams, are drawn from the case study States. Considerations involved in selecting the organizational location for planning responsibilities are pointed out (e.g., coordination with other social services and planning systems, strong participation of substate areas) and used to rank the organizational configurations described. Subsequent sections deal with considerations in staffing the planning system (e.g., skills and backgrounds needed, full or part-time staff requirements), using substate - level assistance in planning, and making staff assignments.

Blue Print. Planning a Social Service Delivery System.

Utah Dept. of Social Services, Salt Lake City. Div. of Family Services.
Jun 72, 164p Executive Summary available from PROJECT SHARE.
SHR-0000254 Available from PROJECT SHARE, PC$6.75.

Guidelines for the creation of a new service delivery system are presented by the Utah Division of Family Services. The Plan is divided into two major sections: the administrative subsystem, and the direct services subsystem. The administrative subsystem is composed of the management model, plus provisions for fiscal support, technical assistance, and both ad hoc and standing committees. The office of the director is contained within this subsystem, supported by the executive committee, the division board, advisory committees, planning office, community relations office, provisions for fair hearings, deputy director, and research and projects. Additional components of the administrative subsystem are field operations, and resource development and mobilization, which is concerned with a service catalog, unmet needs bank, removal of barriers and deficiencies, and licensing and approval. Specialists' service and training, together with support operations such as a management information system, finance and manpower, and communications services are also included. The regional office component designs, implements, the delivers social services that are within State guidelines and are appropriate for regional areas. The direct service subsystem contains a delivery model, a master services unit, a functional services unit, and a facilitating services unit. Appendices provide purpose statements for demonstration and special projects, reports generated by a similar system in

Maine, bibliography, and glossary. Portions of this document are not fully legible.

Changing Demand for Local Capacity: An Analysis of Functional Programming and Policy Planning.

Aug 72, 88p Executive Summary available from PROJECT SHARE.
SHR-0000527 Available from NTIS, PC$6.00/MF$3.00.

Functional programming and policy planning processes and capacities are compared for five cities: Memphis, Tennessee; Tucson, Arizona; Pasco, Washington; Tampa, Florida; and San Jose, California. The study on which the report is based involved site visits to the five cities between the summer of 1971 and the winter of 1973, during which time the planning, programming, budgeting, resource allocation, and evaluation capacity of each were assessed. The study cities vary in size and in the structure of the local government. Both Model Cities and non-Model Cities sites are included. The study report opens with a general discussion of the changing demand for local capacity, including a review of Federal initiatives and of the role of local planning departments, regional planning, Community Action Agencies, Model Cities, and Department of Housing and Urban Development (HUD) grant consolidation in the development of local planning capacity. The potential for social service consolidation at the local level is discussed, as is the changing role for private agencies. Working definitions are presented for functional programming and policy planning. Major issues that evolved from comparison of the five cities are analyzed relative to functional agencies and their relationship to local government, the capacity for functional programming across human resources activities, functional programming and the relationship to long range planning, and the emergency of policy planning units. Individual case study summaries follow for each of the cities. Each summary includes a brief description of city government organization; organizational capacity for policy planning; and physical development and human resources planning, programming, coordination, budget and resource allocation, and evaluation processes. An assessment of the involvement of general purpose government in physicial and human resources programs is also provided. The Tampa and San Jose reports describe the creation of new organizational entities for planning and/or programming under HUD's Planned Variations experiment. This is No. 12 in the Community Development Evaluation Series.

Clusters as a Planning and Coordinating Device in Human Services.

Kathy Willis.
Board for Fundamental Education, Indianapolis, Ind.
Apr 75, 25p
SHR-0000594 Available from BFE, Inc., 333 N. Pennsylvania St., Indianapolis, Ind. 46204.

The use of clusters is discussed as a planning and coordinating device within the framework of human services. Clusters refer to working groups of people usually associated with agencies and organizations in the human services framework. The objective of clusters is to consolidate different human service functions into a concerted operation. The cluster management approach is utilized to end the isolation of agencies and to remedy their structural inability to respond with specific services needed by individuals at a particular time. Fragmentation, duplication, and gaps in service are some of the issues addressed by clusters in their attempt to achieve better allocation of funds in relation to community needs and better management of the total human service delivery system. Examples of the cluster approach are cited, including the case conference system, which centralizes activities of agencies serving one client in common, and community councils of social service agencies, which may serve to impact community welfare planning. Various bases for group cohesion in the clustering process are identified, along with essential factions for effective cluster management. Strong citizen participation and intralevel representation of social welfare

planners are emphasized as important elements for reaching positive and creative solutions. Mechanisms for minimizing resistance to clusters are discussed. Advantages of ad hoc groups and super-agency operations are noted, and it is implied that both structures are desirable for a cluster network to achieve greater productivity within the human service delivery system. A bibliography is provided.

Community Organization and Social Planning.

Robert Perlman and Arnold Gurin.
Council on Social Work Education, New York.
1972, 302p
SHR-0000678 Available from John Wiley and Sons, Inc., 605 Third Ave., New York, N.Y. 10016.

Community organization and social planning are reviewed in a textbook that resulted from a study conducted by the Council on Social Work Education. In compiling information for the study, staff of the community organization curriculum development project conducted interviews with practitioners and made field visits to a number of social work programs in different parts of the country, including projects in both voluntary and governmental agencies at National, State, and local levels. The primary purpose of the textbook is to provide faculty and students with relevant and useful information on social work disciplines. It is also designed to be of value for agency inservice training and continuing education programs. The organizational framework for community organization and social planning is discussed, along with necessary elements of practice in such organization and planning. Three areas of community organization and social planning are identified: (1) voluntary associations; (2) agencies that provide services directly to clients; and (3) planning organizations. The goal of comprehensiveness in planning is considered, and the future of social work practice is examined. An appendix outlines the contents of a companion volume to the textbook which is entitled 'Community Organizers and Social Planners: A Casebook.'

Community Organizers and Social Planners: A Volume of Case and Illustrative Materials.

Joan Levin Ecklein and Armand A. Lauffer.
Boston State Coll., Mass.
1972, 390p Executive Summary available from PROJECT SHARE.
SHR-0000605 Available from John Wiley and Sons, Inc., 605 Third Ave., New York, N.Y. 10016.

Case studies are reported which depict problems and projects handled by professionals involved in community organization and social planning. The compilation of case studies is the result of a three-year comprehensive study of the community organization curriculum in graduate social work education sponsored by the Council on Social Work Education. The purpose of the case study volume is to provide relevant and useful teaching material for formal educational and agency inservice training programs to prepare staff with competence in community organization and social planning. Case and illustrative materials show community organizers and social planners at work in various settings. Information on each case study was obtained from 1965 through 1969, and a conceptual framework was devised for organizing all case reports. That framework defines organizers as individuals who direct their activities toward modifying the behavior of people in their roles as citizens, consumers, members, or functionaries of organizations. Social planners are defined as individuals who direct their activities toward the modification, elimination, or creation of policies, programs, services, or resources in organizations and social institutions. An appendix contains the interview guide used to obtain case study materials.

Compendium of Human Resources Planning Process in the State of Washington. Volume I: Human Resources Legislation, Regulations, and Guideline Summaries.

Washington State Office of Community

Development, Olympia. Human Resources Demonstration Project.
Sep 74, 290p Executive Summary available from PROJECT SHARE.
PB-242 904 Available from NTIS, PC$11.00/MF$3.00.

Summaries of legislation and administrative directives which serve as the basis of human resource agency planning in the State of Washington are presented. The Office of Community Development/Human Resources Demonstration Project (HRDP) surveyed program administrators involved in human resource planning in Washington to identify relevant legal requirements and administrative directives. These laws, Executive Orders, regulations and guidelines are grouped into seven categories — health, mental health/drug abuse/developmental disabilities/alcohol, manpower, social and human service facilities, law and justice, aging, and social services. Within each category, legislation and administrative directives are grouped into functional areas, and interrelationships between the functional areas are described. The functional area format is comprised of the following information: history, legislative sources, target groups, activities funded, Federal organization, State organization, local organization, State plan, local plan, review and approval process, and funding and allocation information. Legislative sources are categorized as Federal laws, Federal regulations, Federal guidelines, State laws (and Executive Orders), State regulations, and State guidelines. A conversion table shows the relations between the categories, interviews and agencies. Further information is contained in Volumes II and III of this compendium of Human Resources Planning Processes. Portions of this document are not fully legible. Volumes II and III are available as SHR-0000119 and SHR-0000120 respectively.

Compendium of Human Resources Planning Processes in the State of Washington. Volume II: Survey of State Human Resources Planning Processes.

Washington State Office of Community Development, Olympia. Human Resources Demonstration Project.
74, 251p
SHR-0000119 Available from PROJECT SHARE, PC$9.00.

Results of a survey of human resource agency administrators to discern how human resources planning is conducted in the State of Washington are reported. Volume II of a three-volume series on Human Resources Planning Processes describes the perceptions of agency personnel who implement human resource programs on a day-to-day basis. Twenty-five interviews were conducted with agency personnel in State programs in seven areas: health, mental health/drug abuse/developmental disabilities/alchol, manpower, social and health service faclities, law and justice, aging, and social services. A narrative summary of each interview is provided according to the above problem areas. Within each area, a functional format provides the following information corresponding to the functional area format used in Volume I: legislative authority, target group, activities funded, Federal organization, State organization, local organization, State plan, local plan, review and approval process, and funding and allocation information. Eighteen charts depict comparative information from the survey of State human resources planning processes. Responses to each survey questionnaire are appended and a copy of the survey instrument is included. Portions of this document are not fully legible. Volumes I and III are available as SHR-0000118 and SHR-0000120 respectively.

Compendium of Human Resources Planning Processes in the State of Washington. Volume III: Survey of Local Human Resources Planning Processes.

Puget Sound Governmental Conference, Seattle, Wash. Div. of Human Resources.
Sep 74, 81p
PB-242 906 Available from NTIS, PC$6.00/MF$3.00.

Results of a survey conducted by the Human Resources Division of the Puget Sound Governmental Conference to identify and describe local human resource planning systems in the State of Washington are reported. The purpose of the survey was to document the specific activities and factors involved in each local functional human resources planning effort and to determine ways in which the planning processes do or do not complement one another. Fourteen local human resource agency staff persons in the King County area were interviewed. The interviews concerned: scope of planning efforts; steps and timing in the planning process; decision-making bodies and the nature and duration of their involvement; relationships between elected officials, staff, and citizens; provisions for conflict resolution; interaction with other functional areas; statutory authority for planning; and the current funding base. The fourteen interviews are provided, as are appendices depicting comparative information from the interviews. This is Volume III of a three-part series concerning Human Resources Planning Processes in the State of Washington.
Portions of this document are not fully legible. Volumes I and II are available as SHR-0000118 and SHR-0000119 respectively.

Comprehensive Human Resource Planning Guide.

Pudget Sound Governmental Conference, Seattle, Wash.
1974, 133p
SHR-0000122 Available from NTIS, PC$7.25/MF$3.00.

Ways in which local human resource programs are planned and funded are explored in this second of three volumes developed by the Puget Sound Governmental Conference of Washington to assist local human resource planners in the planning process. This volume is designed to aid the comprehensive planning staff in preparing material for official policy-making and to describe the role and responsibility of local government planners in developing a comprehensive human resource plan. A basic seven-step planning process is proposed: assess needs, inventory resources, priority setting, allocation of funds, prioritize remaining unmet needs, and monitor and evaluate. Before any planning begins, however, how the existing system works must be determined. Suggestions for the definition of the roles of various elected officials, staff, and advisory groups are included. The appendix, which comprises the bulk of this volume, contains a needs assessment format, City of Seattle inventory form, a summary of Human Resource Legislation, a manual for reviewing an environmental impact statement, and a guide for the A-95 review process. Volumes I and III are available as SHR-0000121 and SHR-0000123 respectively.

Comprehensive Human Services Planning and Delivery. Taunton Area.

Taunton Area Community Mental Health Program, Mass. Governance Body.
1975, 26p
SHR-0000560 Available from NTIS, PC$4.50/MF$3.00.

The organization and accomplishments of the human service delivery system in the Taunton, Massachusetts area are described and the development of the Taunton management and services integration model is discussed. The Taunton Area Governance Body's accomplishments include: establishment of eight human service centers, development of an integrated service program for the mentally and physically disabled, improving the quality of nursing and rest home care, and deinstitutionalization. The Taunton model involves a stacked matrix which brings together the separate processes of individual categorical services and crosscutting integration at each of four geographic scales (community/neighborhood, area, region, and State). In such a matrix, most agency staff have two supervisors -- a categorical director and an integrating director. On one side of the matrix are community human service coordinators, and area specialties are on the other side; the result is the combination of specialty services delivered in a coordinated manner. A discussion of research and development goals and objectives is included. Portions of this document are not fully legible.

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Coordinating Federal Assistance in the Community. Use of Selected Mechanisms for Planning and Coordinating Federal Programs.

Department of Housing and Urban Development, Washington, D.C.
1972, 96p Executive Summary available from PROJECT SHARE.
SHR-0000526 Available from NTIS, PC$6.00/MF$3.00.

The use of 10 Federally assisted mechanisms for local level planning and coordination of Federal programs was examined to determine whether the mechanisms provided an opportunity for increased local influence on Federal programs and to observe developments in local planning and management capacity associated with the use of the mechanisms. The following mechanisms were assessed: comprehensive areawide health planning (314b), community mental health center planning, cooperative area manpower planning system (CAMPS), law enforcement assistance planning, Elementary and Secondary Education Act (Title I planning), community coordinated child care planning, model cities planning, community action agency checkpoint procedure for local review of community action agency funding applications, certification signoff on DHEW programs by model cities directors, and the A-95 project notification and review system. A detailed description of each of the federally assisted planning mechanisms is provided. The experience of five cities in using the mechanisms as tools for local government influence on Federal programs is examined. Local government use of the mechanisms is explored, along with leadership achieved through the mechanisms by local chief executives, and constraints on the development of local government leadership through the mechanisms. The impact of the mechanisms on local roles is discussed, and policy implications for local and Federal officials are noted. Types of policy planning and coordination activity are outlined. An appendix provides information on Federal decentralization policies and local planning and coordination. This is No. 8 in the Community Development Evaluation Series.

Design of Pre-Test of the Allied Services Act of 1972. Final Report.

Contra Costa County Human Resources Agency, Martinez, Calif.
1976, 39p
SHR-0001484 Available from NTIS, PC$4.50/MF$3.00.

The outcome of a services integration targets of opportunity (SITO) project in Contra Costa County, California, concerned with the design of a pretest of the Allied Services Act of 1972 is reported. The report is essentially a proposal for a comprehensive human services planning and decisionmaking process and organization for Contra Costa County. The project, which became operational in January 1973, developed and tested a concept of coordinated planning for human services that brought together the county, the city of Richmond, the Richmond Unified School District, and a broadly representative body of citizens. The planning group drew on existing data about social needs in the community to identify social problems that might be removed or ameliorated by a service delivery system combining the resources of two or more of the county's agencies. The findings, conclusions, and recommendations of the planning group are summarized, the background of the project is described, and the human services planning system existing in Contra Costa County at the time of the project is characterized. An alternative human services planning organization is suggested, involving a human services planning commission, cluster task forces, and planning support staff. Organizational diagrams and tabular summaries of findings are included. Project participants and other project documents are listed.

Designing Social Service Systems.

Jack C. Bloedorn, Elizabeth B. MacLatchie, William Friedlander, and J.M. Wedemeyer. American Public Welfare Association, Chicago, Ill.
Sep 70, 101p
SHR-0000709 Available from NTIS, PC$6.50/MF$3.00.

Policy and planning issues associated with the design of social service systems are reviewed, based on the development of models and operating specifications in Pennsylvania and Maine. An approach to planning a public social service system is described which involves four steps: (1) formulation of overall objectives; (2) development of desirable criteria and characteristics of a public social service system by repeating overall objectives down through layers of subobjectives to criteria using an objective-means interative approach; (3) selection of a subset of alternative concepts and ideas pertinent to social services which best meet criteria; and (4) selection of functional and organizational structure which best translates specific concepts and ideas into a practical and implementable form. The historical and statutory context of planning is described, and fundamental ideas and concepts involved in social service system design are noted. Such concepts relate to the separation of aid and service functions, risk and target populations, community development approach, individualization and objectification, scope and content of services, client programming, and service inventory. An operating model for guiding the development of social service systems is discussed which emphasizes three supportive functions: planning, research and evaluation, and mobilization. Functions of State and local organizations in the delivery of social services are examined, along with economic aspects of a public social service system. An input/output social service system model and a functional cycle model are proposed for integrating public social services into a system.

Development of a Conceptual Approach to Strategic Health Planning. Final Report.

Aviso, Inc., Atlanta, Ga.
3 Apr 73, 76p
PB-239 771 Available from NTIS, PC$6.00/MF$3.00.

A conceptual approach to strategic health planning is presented for use by the Office of the Assistant Secretary for Planning and Evaluation, U.S. Department of Health, Education, and Welfare (DHEW/OASPE-HE) in its expansion from an evaluation — only emphasis to a combined planning and evaluation emphasis with regard to the national health care delivery system. The context, rationale, and description of strategic planning are discussed; management of strategic planning is emphasized in the outline of initial projects to be undertaken; comments regarding content and methodology of strategic planning for health care, as well as costs and funding, are excluded. The structure or process for strategic planning presented is based on the following assumptions: (1) a rigid, authoritarian structure for strategic planning has no justification in the health context; (2) the role of catalyst in establishing strategic planning and the temporary role of manager of strategic planning can best be played by DHEW/OASPE-HE; (3) planning and evaluation must be formally related in the structure for strategic planning; (4) management style (i.e., minimum permanent staff, high leverage in policy formulation, low visibility) now in use by DHEW/OASPE-HE in health evaluation applies in strategic planning; and (5) the scope of the health care system must be extended to include not only traditional clients or participants (i.e., suppliers, providers, sponsors), but the clients of these clients, to achieve an adequate system definition. The proposed structure for health care strategic planning features the following organizations or groups: DHEW/OASPE-HE, concerned with management of planning and evaluation; the Issues Board, which defines strategic issues, determines topics, and plans seminars; sponsoring institutions, suppliers of human resources and sponsors for the Issues Board and for seminars; the manpower pool, a formal network of key human resources; and contractors, including government agencies, consulting firms, private businesses, etc., to carry out evaluation and planning assignments.

Developments in Human Services. Volume I.

Herbert C. Schulberg, Frank Baker, and Sheldon R. Roen. Harvard Medical School, Boston, Mass.

1973, 536p
SHR-0000486 Available from Behavioral Publications, Inc., 72 Fifth Ave., New York, N.Y. 10011.

In the first of two volumes concerning developments likely to influence human services administration and delivery in the 1970's the following broad topics are addressed: teaching health and human services administration by the case method, the planning and administration of human services, strategies in innovative human services programs, and developments in human services education and manpower. An introductory discussion identifies those human services program development efforts which hold greatest promise for the future. It is noted that the major characteristics of human services in the 1970's will include less segmented and more comprehensive approaches to client problems, decentralized facilities closer to population centers, and integrated program administration permitting continuity of care. The individual sections of the book consider the impact of these developments on participating personnel, as well as issues germaine to manpower patterns, training, practice, and research. Among specific topics of discussion are: the case method of teaching; organizational issues and models; resource management; elements of planning; development of operational plans; policies, accountability, and social change; planning constraints; the administrative process; examples of innovative strategies in human services delivery; changing dimensions of professional intervention; modular education and the development of career lattices; and academic costs, effectiveness, and evaluation. Illustrative examples are drawn from the experiences of several programs and projects. Volume II is available as SHR-0000484.

Developments in Human Services. Volume II.

Herbert C. Schulberg and Frank Baker.
Harvard Medical School, Boston, Mass. Dept. of Psychiatry.
1975, 404p
SHR-0000484 Available from Behavioral Publications, Inc., 72 Fifth Ave., New York, N.Y. 10011.

The second volume in a two-volume series on developments in human services focuses on the dominant social values and organizational practices likely to shape human services during the 1970's. These factors are identified and related to an overview of the systemic principles underlying service delivery, to an analysis of the economic principles fundamental to program development, and to suggestions for establishing human services in new communities. In the introduction, factors affecting human services program growth are identified, including the effects of social values on public support for professional efforts, systems concepts as the basis for human services ideology, economic elements which must be considered by planners and providers, and the implications of the growing priority placed on integrated comprehensive services for manpower utilization decisions. A section on development of program models for the human services considers comprehensive versus categorical services, patterns of relationships between human services programs, relationships between health and mental health subsystems, and an idealized systems model. An economic perspective for examining the delivery of human services is presented, and economic characteristics of the markets for human services are described. Suggestions for development of human services programs in new communities are offered. Volume I is available as SHR-0000486.

Dialectics of Social Planning.

Neil Gilbert, Harry Specht, and Armin Rosenkranz.
California Univ., Berkeley. School of Social Welfare.
1972, 9p
SHR-0000544 Pub. in Social Work v18 p78-86 Mar 73.

The dialectics of social planning are discussed in terms of the continuing cycle of competition

among values that govern the management of community affairs. The dialectics of social planning refer to the cycle of competition among three primary societal values: participation, leadership, and expertise. Changing trends in social planning are illustrated by Planned Variations, a program of the Department of Housing and Urban Development (HUD) that was designed to grant extensive authority to local executive leadership. Planned Variations attempts to shift the locus of allocative decisionmaking with the Federal urban grant system to local executive leadership. It breaks ground for revenue sharing by means of a mechanism approaching block grants to Model Cities Programs at the local level. The program's impact at both city and neighborhood levels is assessed. The role of social planners is examined in relation to changing social values, and it is suggested that the central challenge to social planners is to avoid drifting toward the societal value of leadership. Rather, such planners should attempt to chart an independent course of action, one designed to facilitate the dialectical process and stimulate values that are fundamental to urban growth.

Evaluation of Local Coordinating Programs. Volume II: Coordinating Federal Assistance in the Community.

Marshall, Kaplan, Gans, and Kahn, San Francisco, Calif.
Mar 71, 84p Executive Summary available from PROJECT SHARE.
PB-240 664 Available from NTIS, PC$6.00/MF$3.00.

The role of local governments in the A-95 project notification and review system is described and analyzed, and the use of nine other federally assisted mechanisms for local level planning and coordination of Federal programs is examined. The following federally assisted mechanisms are considered, in addition to A-95: comprehensive areawide health planning (314b agencies); community mental health center planning; cooperative area manpower planning system (CAMPS); law enforcement assistance planning; Elementary and Secondary Education Act (Title I); community coordinated childcare planning; model cities planning; community action agency planning; and certification signoff for DHEW programs by model cities directors. The 10 federally assisted planning mechanisms are of two basic types: review and comment mechanisms and planning mechanisms. Detailed descriptions of the meachanisms are provided, and their use in the cities of Newark, New Jersey; Dayton, Ohio; New Orleans, Louisiana; Tucson, Arizona; and Pasco, Washington is discussed. Types of policy planning and coordination activities achieved through the mechanisms are examined. The mechanisms are viewed as tools to be used by local governments in influencing Federal programs. Consideration is given to the attainment of local leadership through the mechanisms and to the changing relationship between local governments and Federal assistance. An appendix provides information on Federal decentralization policies and local planning and coordination. See also Volume I, PB-240 663/AS.

Goal and Objective Setting in a Title XX State Social Services Planning System.

E. D. Anderson, Thomas K. Corish, and Joel I. Gottlieb.
Research Group, Inc., Atlanta, Ga.
Apr 75, 36p
SHR-0001122 Available from Research Group, Inc., 1230 Healey Bldg., 57 Forsyth St., NW, Atlanta, GA 30303.

Guidelines are presented for use by social services planners in developing goals and objectives for State comprehensive annual services program plans under Title XX of the Social Security Act. The manual provides definitions of the major concepts involved in setting goals and objectives, including national goals, service and administrative objectives, alignment of services and objectives with national goals, fiscal year and annual objectives, and objectives for monitoring and evaluation. Examples of each concept are drawn from a hypothetical State plan. Two plan forms specific to goals and objectives are discussed and illustrated: the catalogue of services, suggested as a

basis for Title XX planning; and the program summary form, which organizes the catalogue of services around national goals. Five basic steps in the goal and objective setting process are described in detail: aggregating services and goals; drafting service objectives; expanding service/administrative objectives; preparing brief service definitions; and entering information on plan forms. Examples of a completed catalogue of services and a completed program summary, both drawn from the hypothetical State, are provided.

Group Process Model for Problem Identification and Program Planning.

Andre L. Delbecq and Andrew Van deVen.
Wisconsin Univ., Madison.
1971, 31p
SHR-0000346 Pub. in Jnl. of Applied Behavioral Science v7 n4 p1-31 Jul-Aug 71.

A group process model, the PPM (program planning model) is developed to assist planning groups in the identification of strategic problems and the development of appropriate and innovative solution programs. PPM is a sociological model suggesting a planning sequence which provides an orderly sequence for decisionmaking. In the PPM process, program planning and development are divided into five phases: program exploration, knowledge exploration, priority development, program development, and program evaluation. Each of these phases is discussed in detail. The group process model highlights critical issues and provides a guideline for developing innovative solution strategies where clients, specialists, resource controllers, and administrators must interact. It suggests group processes and agenda formats to guide each phase of program evolution. In addition, the general character of the group process is consistent with research on organizational change and social planning.

Guide for Categorical Human Resources Planners.

Puget Sound Governmental Conference, Seattle, Wash.
30 Sep 74, 31p
SHR-0000123 Available from NTIS, PC$4.50/MF$3.00.

The role of the planner responsible for a specific subject area is discussed to enable local human resource planners to deal with categorical planning — one year budgets which focus on single issues. This manual, one of three planning guide books developed by the Puget Sound Governmental Conference of Washington to aid local resource planners, traces the same planning process applicable to all categorical areas, explores the roles and responsibilities of staff, advisory groups, and elected officials, and details the planning process. The present Federal categorical system results in a piecemeal and inefficient method of defining and meeting human needs. At the same time, State and local governments are playing a larger role in human resource fields. Consequently, a planning process is needed to compare categorical plans and to provide for comprehensive planning. A process proposed for both categorical and comprehensive planning contains the following steps: assess needs, inventory resources, compare needs to resources, set priorities, allocate funds, list remaining unmet needs in priority order, and monitor and evaluate. Roles are defined for elected officials, advisory boards, and categorical planning staff under the proposed planning process. Volumes 1 and 2 are available as SHR-0000121 and SHR-0000122 respectively.

Guide to Human Resource Planning for Elected Officials.

Puget Sound Governmental Conference, Seattle, Wash.
30 Sep 74, 11p
PB-241 328 Available from NTIS, PC$4.00/MF$3.00.

A manual is provided by the Puget Sound Governmental Conference of Washington to aid elected

officials in understanding the human resources planning system, the scope of current planning efforts, and the policy decisions local elected officials may be called upon to make. At the present time, human resource planning involves a maze of programs and projects funded independently by different Federal departments, agencies, and bureaus. Because of this lack of coordination, local human services contain both gaps and duplications. It is proposed that local officials develop a human resource system that meets local needs and then requests State and Federal authorities to support it. The structure of a comprehensive system is suggested, along with some basic decisions to be made by elected officials. Other suggestions involve staff support; descriptions of comprehensive and categorical plans; negotiating, monitoring, and evaluating a plan; and determining the value of locally funded projects. Basically, this manual provides an outline of the role of the elected official in the planning process; it is the first of three volumes developed by the Puget Sound Governmental Conference to assist local human resource planners in the planning process. Portions of this document are not fully legible.

Guide to Program Resources for Area Planners in Aging. Working Draft.

Project TAP, Ann Arbor, Mich.
1974, 109p
SHR-0000680 Available from NTIS, PC$6.50/MF$3.00.

Program resource guidelines are presented that may be used by persons involved in area planning for the aging. It is noted that there are two types of resources which must be considered by an area agency on aging: (1) organizations, associations, and individuals who either provide services to older people or represent a potential source for the provision of these services; and (2) influence obtained through access to such commodities as money, credit, facilities, manpower, political authority, knowledge, and expertise which can be used to shape the development and conduct of social services. A matrix is presented that is designed to help planners visualize the service components of a community system of services for older people. The matrix is two-dimensional in that it differentiates services by area and function. Actual planning tasks performed by area agency planners are simulated in relation to the identification of services and locating them within a blank matrix, expanding the arrangement of services into a model arrangement, identification of those community resources required for the development or expanision of a chosen service or set of services, and mechanisms best suited for relating identified resources with a service development or expansion effort. An inventory of programs and services for the aging is provided that is organized by program area (health, income maintenance, nutrition, home help, community participation, education, employment, housing, and protective services).

Handbook for Planning and Managing Community Development.

League of California Cities, Sacramento.
1974, 329p Executive Summary available from PROJECT SHARE.
SHR-0000713 Available from NTIS, PC$12.00/MF$3.00.

A handbook is provided by the League of California Cities to assist local government officials in meeting community development problems. The handbook is process-oriented and is based on the premise that the capabilities and responsiveness of urban systems can be enhanced through a systematic recognition of interrelated problems and that programs can be planned and managed in a coordinated, resource-maximizing way. New Federalism, the proposal by the Nixon Administration to restructure the Federal government through devolving power to local governments, is discussed, and background information is provided on Federal housing and community development programs. The transformation of Federal grants from categorical programs to block grants is described. The roles and responsibilities of government levels under the old Federal system are identified, and the issues likely to surround in-

tergovernmental relations under New Federalism are discussed. The process of capacity building for community development block grants is outlined. The citizen participation process within New Federalism is described, and organizational structures are suggested. The environment and the likely composition of programs designed to meet the physical needs of communities are considered, and the evolution of the human resources system and its relationship to community development are described. Appendices and a bibliography are included.

How 13 Texas Communities Started Working for Children. First Report on Planning in the TDCA/OECD Demonstration Project.

Texas Dept. of Community Affairs, Austin. Office of Early Childhood Development.
1973, 125p
SHR-0000897 Available from NTIS, PC$6.50/MF$3.00.

A preliminary report describes the planning process used in 13 pilot projects designed to demonstrate ways in which the Texas State government could work with local governmental officials, public agencies, parents, and other interested citizens to plan and implement early childhood development services in local communities. The projects have been classified into two types, county and special projects, which differ in the way they were selected by the Office of Early Childhood Development and the process followed in developing local early childhood projects. The report describes and compares the distinquishing characteristics of county and special projects and explains the process for selecting the two types of projects, the process of notifying the communities of their eligibility, the strategy for delegating planning responsibility, and the selection and operations of steering committees. The planning process is discussed in detail in a section which focuses on the efforts of the demonstration projects during the first three phases of planning (problem exploration, knowledge exploration, and program design). For each phase, the planning activities are described in terms of substantive results, process findings, and recommendations which indicate directions for future planning efforts. Also discussed are training and technical assistance and the contract review process. A summary of recommendations resulting from the study, a memorandum describing the application of county need indicators to county selection process, and a tabular summary of planning data are included.

How to Develop the Comprehensive Annual Services Plan for Title XX. A Guide for Training.

Joan W. Miller.
National Inst. of Public Management, Washington, D.C.
Feb 76, 148p
SHR-0000989 Available from Publications Dept., National Institute of Public Management, 1620 Eye St., N.W., Washington, D.C. 20006.

A manual is presented for use in training individuals involved in the planning and operation of programs authorized by Title XX of the Social Security Act. Designed to be used by both State staff and the public, the manual suggests briefly essential steps which should be considered in the development of comprehensive annual services plans under Title XX. Following a summary of the law, the planning requirements of Title XX are outlined. Verbatim statements of the requirements of the law and regulations are also included. Organizational requirements and options of the regulations are listed, and activities which should be included in an annual schedule are suggested. Individual chapters are devoted to each of the following planning processes: inventorying human services; conducting a needs analysis or needs assessment; setting goals and objectives; resources allocation; citizen participation; and monitoring. Each chapter includes background information, a detailed listing of relevant Title XX requirements, and a discussion of procedural options to be considered. Sample planning instruments drawn from programs throughout the country illustrate the processes described. In addition

to copies of the Title XX statute and regulations, the appendix includes all listing of social indicators for which data are available at the national level. A glossary of terms also is provided. See also SHR-0000990 and SHR-0000991.

Human Resources Element of the Regional General Plan.

Sacramento Regional Area Planning Commission, Calif.
Jun 75, 82p
SHR-0001000 Available from NTIS, PC$6.00/MF$3.00.

Human resource planning activities of the Sacramento, California Regional Area Planning Commission are reviewed. The human resources element of Sacramento's regional general plan identifies and describes factors that affect the social needs of citizens within the region and outlines goals and policies designed to deal with these factors. Consideration is given to the broad areas of health, recreation, welfare, and education. Although the human resources element seeks to address social needs of all regional citizens, emphasis is placed on serving low income individuals. The human resources element is one of the three elements which will ultimately form Sacramento's regional plan. The other two elements involve physical development and environmental quality. Objectives of the human resources element are delineated. An overview of social services planning in the Sacramento region is presented, and trends toward the new federalism approach for planning and delivery services are examined. An account is given of population and income characteristics of the Sacramento region. Roles and responsibilities of key actors in carrying out goals and policies for providing necessary services and programs are addressed. The human resources element is considered to be the policy statement of the Sacramento Regional Area Planning Commission for subsequent planning. Additional information on the human resources element's development and a list of references are appended.

Human Services Consortium: A Combined Municipal Effort in Human Services Management. Rockingham County, New Hampshire.

New England Municipal Center, Durham, N.H.
Nov 75, 12p
SHR-0000307 Available from NTIS, PC$4.00/MF$3.00.

The development of human service evaluation and planning capability in five New Hampshire municipalities is summarized in this case study prepared by the New England Municipal Center. Officials of the five Rockingham County communities met to discuss joint concerns: increased pressure on local governments to fund human service programs; recognition that local officials need basic tools to make human services funding decisions; and realization that some intermunicipal consolidation of authority and resources was the most efficient way to provide the needed tools. Avoidance of duplication in services, a streamlined budget process, and a need for a comprehensive planning system were other concerns expressed. Under a partnership grant from the Department of Health, Education, and Welfare, a needs assessment and resource inventory was completed, and specific budgeting and evaluating tools were designed, including a series of human service manuals and training packages for use by municipal officials and resource agencies in the demonstration area and throughout New England. The major future activity of the project is to form a regional evaluation and planning council for human services. Among the functions of the council will be the standardized evaluation of service agencies, coordinating service programs to avoid duplication, and preparing a regional plan to support Social Security Act Title XX funding. It will also provide a management assistance program for local municipal officials.

Human Services Information System (HSIS) Project of Lancaster County. Volume XI: Phase III Recommendations. A Comprehensive Plan for Services Coordination.

Human Services Information System Project of Lancaster County, Pa.
Jul 74, 111p Executive Summary available from PROJECT SHARE.
SHR-0000712 Available from NTIS, PC$6.50/MF$3.00.

Recommendations on the coordination of information and planning capabilities are presented that resulted from a human services information system (HSIS) project conducted in Lancaster County, Pennsylvania. Five major functional areas of service agency involvement are noted with regard to the coordination of information and planning capabilities: (1) direct service programs and activities; (2) service-supportive programs and activities; (3) planning programs and activities; (4) administrative programs and activities; and (5) information programs and activities. Recommendations are based on a program inventory of 158 agencies in Lancaster County, detailed planning efforts (system design reports and operation and procedures manuals developed by the HSIS project team), interviews with approximately 40 agencies to obtain critical review and input, and standards for a human services system. The establishment of efficient and effective standards for a human service delivery system is examined, and program components of such a system are listed. Recommended opportunities for coordination by functional area are listed, and requirements for implementing the recommendations are delineated. Appendices provide additional information on functional planning components considered in the HSIS project. Volume XXIII is available as SHR-0000711. Other related volumes are available as SHR-0000153-SHR-0000154, SHR-0000382-SHR-0000384, SHR-0000477, and SHR-0000608.

Human Services Integration Planning: A Case Study.

Minnesota State Planning Agency, St.Paul
Human Resources Planning Unit.
Feb 74, 96p Executive Summary available from PROJECT SHARE.
SHR-0000088 Available from PROJECT SHARE. PC$5.00

A compilation of working papers developed by the Human Resources Planning Unit of the Minnesota State Planning Agency is presented for the purpose of disseminating literature regarding human services integration. The collection contains a presentation prepared for the Midcontinent Conference of the American Society of Public Administration, entitled 'Human Services Integration — Will it Work.' An implementation progress report prepared for the Minnesota State Legislature is included, as is a systems description of an analysis tool. Background data on the Minnesota Human Services Act of 1973 is supplied, as are observations on implementing the Act. Other material included in the compilation is a discussion paper concerning a coordinating mechanism for State level human service agencies, and an example of a planning process for deinstitutionalizing a specific population, entitled CAIR and prepared by the Developmental Disabilities Council. The final document is a consultant's progress report on the development of a model of cause and effect relationships that might affect the performance of a Human Services Board. All material is recent, the earliest from August, 1972, and the emphasis of the collections is specifically from the point of view of an activist State Planning Agency. Portions of this document are not fully legible.

Human Services Planning: A Guidebook for Savannah and Chatham County.

Savannah Bureau of Public Development, Ga. Human Services Div.
1976, 122p
SHR-0001478 Available from NTIS, PC$6.50/MF$3.00.

A guide to resource development for local human services agencies is presented as part of a program to develop technical assistance and facilitate coordination among agencies in Savannah and Chatham Counties, Georgia. The guide contains narrative reviews of needs assessment,

resource identification, proposal preparation, and grants administration, as well as listings of resources, contact persons, local data sources, and other descriptive information. Topics covered include the use of available local data, agency records, and data from other agencies in needs assessment; the Catalog of Federal Domestic Assistance; local planning offices, regional Federal offices, and elected officials; major Federal funding sources; foundations and endowments, corporate giving, agency-generated income, and United Way funding; and researching legislation and regulations to determine the appropriateness of funding sources. Other topics include the basic funding proposal outline; A-95 notification and review; equal employment opportunity compliance; grant administration and program management; an overview of A-95; a local perspective on A-95; and cooperation and coordination. Appended materials include summaries of local research and surveys; summaries of licensing standards (Georgia); a list of printed resources; a list of Federal funding sources that require compliance with Federal Management Circulars 74-4 and 74-7; a list of Federal resources requiring compliance with A-95 review and notification procedure; and a survey of major foundations.

Human Services Planning at State and Local Levels. The Design of Planning Networks.

David M. Austin.
Texas Univ. at Austin. Center for Social Work Research.
Apr 76, 54p
SHR-0000752 Available from NTIS, PC$5.25/MF$3.00.

Following a brief review of the historical background of human services planning in the United States, factors involved in the 1976 expansion of human services planning activities are described, and ways in which the vertical network of planning activities has emerged in Texas are examined. The discussion of the context of human services planning addresses the concept of new federalism, State plan requirements, community alternatives, public awareness, and the rate of social change. The description of the emergence of human services planning networks notes organizational changes in both State single-purpose agencies and general-purpose governments. Key elements in the evolving networks are identified as the elaboration of technical staff components at all levels of government and the development of a pattern of vertical interaction, particularly between local general-purpose governments and State single-purpose agencies. The emergence of elaborate vertical intergovernmental human services networks, as exemplified by trends in the State of Texas, is said to be the result of two sets of forces: moves by State single-purpose agencies to decentralize both program operations and management functions, and efforts by local general-purpose governments to combine their forces to achieve more effective representation in State-level decisionmaking. Issues relevant to community planning processes within the State — local network of human service programs are discussed, including development of an analytic framework for examining human serivce programs within a single community, and specification of planning authority within community.

Human Services Planning, Financing and Delivery in Virginia. Volume I. Human Services Planning and Delivery in Virginia.

Virginia Office of the Governor, Richmond.
Office of Human Resources Services.
Feb 73, 326p Executive Summary available from PROJECT SHARE.
PB-239 785 Available from NTIS, PC$12.00/MF$3.00.

Phase II of a five-year work program undertaken to examine human service delivery systems in Virginia, to explore alternative funding and delivery arrangements, and to design a new statewide delivery system is reported. Phase II involves an assessment of problems in two major cities, Norfolk and Richmond; a determination of needs, gaps, and constraints concerning human service

delivery programs in the public and private sector; and an evaluation of the program planning and development process at the State and local levels. Following a summary of recommendations, Chapter I describes study objectives and scope. Chapter II discusses need identification in the areas of drug abuse, education and recreation, employment and rehabilitation, health, mental health, social services, and other areas investigated in the Norfolk-Richmond study. Chapter III examines existing resources in each of the above areas and identifies gaps between resources and needs. Constraints to service delivery, such as legislative, organizational, and funding limitations, are discussed in Chapter IV. Chapters V and VI describe aspects of program planning at State and local levels. Chapter VII examines the Allied Services Act of 1972 and its implications for Virginia. Chapter VIII presents in detail recommendations for improving service delivery in Virginia. Appendices, which comprise the bulk of the document, present details on study methodology, supporting data for the assessment of resources, an analysis of relevant Federal legislation, the questionnaire used in the survey of local agencies, and a format for State plan analysis. This is volume I of a four volume set.

Human Services Planning Study: A Comparative Analysis of HEW and State Requirements Impacting Sub-State Human Services Planning in Minnesota.

Gary G. Dodge and Peter M. Flaherty.
Minnesota State Planning Agency, St. Paul.
Human Resources Planning Unit.
Jul 75, 115p Executive Summary available from PROJECT SHARE.
SHR-0000113 Available from PROJECT SHARE, PC$5.50.

Federal and State barriers to county-level planning and integration of Human Services Programs in Minnesota are identified in a study to investigate Federal planning assistance to State and local governments that impact upon sub-state Human Services planning. This study by the Minnesota State Planning Agency, involved development of an analysis matrix for reviewing budget expenditures, collection and review of source documents, literature review, and interviews with State, regional, and county human service professionals responsible for plan development and coordination. A review of Federal and State statutes and regulations indicates that these provide minimal constraints on State and county human services planning and organization. There is minimal coordination and linkage at all organizational levels, and while Minnesota has sufficient flexibility to restructure its systems, there are administrative problems involving single-county and service-area congruence. The human services planning and decisionmaking structure should be redesigned by Executive Order and greater emphasis placed on management relationships at the State and local levels. Workshop sessions were held in three regional areas of the State to inform local officials of these results and to validate the findings with local and regional program offices. A bibliography and work sheets are appended. Portions of this document are not fully legible.

Implemention Program for a Decision-Making Mechanism in Human Services for the Washoe Council of Governments.

Research Group, Inc., Atlanta, Ga.
30 Jun 76, 36p
SHR-0001201 Available from Research Group, Inc., 1230 Healey Bldg., 57 Forsyth St., NW, Atlanta, GA 30303.

A process for decisionmaking in regard to human services planned and delivered in Washoe County, Nevada is recommended. The report focuses on the roles of the Washoe Council of Governments and its member governments: Washoe County, Reno, and Sparks. The suggested decisionmaking process is based on a model of social planning and decisionmaking in the county developed by the county's community services agency in an earlier study. The report opens with a brief description of the council, its functions, member governments, and staff responsibilities. A

summary of the community services agency study is presented. The existing human services system and the roles of agencies and governmental units involved in planning, funding, and delivering services in the county are described. Questions concerning the council's decisionmaking process are discussed, including the kinds of decisions in human services that the council's board should make; the steps in the social service planning process that must precede decisionmaking; the local agencies that should be responsible for human services planning; the role of council member governments in planning, funding, and delivering services; and the role of the community services agency in human services delivery. The report concludes with an implementation program to be followed in putting the recommended decisionmaking system into operation. The program includes the creation and funding of a human services planning unit with a two-person staff.

Improved Coordination of Human Services. First-Year Activities.

Institute for Interdisciplinary Studies, Minneapolis, Minn. Human Services Coordination Program.
1971, 27p
SHR-0001183 Available from NTIS, PC$4.50/MF$3.00.

The design of a system for coordinating the planning and delivery of human services at the local level is described. The design is the result of the first-year activities of a project concerned with improving coordination of human services planning and delivery in Duluth, Minnesota, and with contributing to the basic technology of human services coordination through the development of a prototype system applicable in any community. The system described is based on a definition of coordination as the process of making services relevant and effective in solving client problems. The system embodies the following activities: (1) identification of clients with potentially solvable problems; (2) reaching out to inform potential clients of services; (3) defining explicitly the problems of clients contacting the system; (4) defining outcomes that represent the best solutions to client problems; (5) defining services that can achieve these outcomes; (6) identifying agencies that provide such services and specifying their eligibility requirements; (7) referring clients to agencies to obtain specific services; (8) following up on the referral to insure that every avenue is explored until the desired outcome is achieved. The system, which is needs-based and problem-solving in focus, is designed to facilitate both the planning and the delivery of services in the general areas of education, health, employment, and social services. In addition to describing the design of the system, the report outlines plans for the operational demonstration of the system in Duluth. A general discussion of the approach taken by the project to overcome barriers to human services coordination also is included. A list of related publications of the Institute for Interdisciplinary Studies is provided. See also final report, SHR-0000025 and SHR-0000026.

Integrated Planning Paper on Problems, Objectives, and Strategies for the Social Service Delivery System in Lansing, Michigan.

Systems Research, Inc., Lansing, Mich.
26 Oct 72, 212p Executive Summary available from PROJECT SHARE.
PB-238 862 Available from NTIS, PC$9.25/MF$3.00.

An attempt to develop a coordinated plan for the delivery of social services in Lansing, Michigan, and to use the integrated citywide planning process to develop a delivery system for social services is described. Problems and problem areas were identified and ranked according to priority in a series of seminars attended by representatives of agencies involved in the delivery of services. Five draft planning papers prepared at the seminars summarize the problems, objectives, and strategies developed for the citywide delivery of services in the areas of crime and delinquency, education, health, manpower, and supportive services. Each of these priority problems is discussed with particular emphasis on overlap and interaction between the problem areas. Objectives for the

citywide delivery of services in each problem area are presented by problem for crime and delinquency, education, health, manpower, and supportive social services. Broad general strategies for resolving the problems and meeting the objectives are suggested to provide a base for planning for implementation of a system for delivering social services. More specific strategies are proposed to resolve each top priorty problem.

Integration of Services is a Process, Not a Product. Final Report.

San Jose State Univ., Calif. Joint Center for Human Services Development.
1976, 160p Executive Summary available from PROJECT SHARE.
SHR-0001174 Available from NTIS, PC$8.00/MF$3.00.

The goal of the Training for the Integration of Services (TIOS) project was to enable participants to improve the processes by which they plan, manage, and implement integrated services programs and organizations. Toward this end, five objectives were set: identify and describe the universe of multiservice or interagency arrangements for the specific delivery of health and social services in the Bay Area of San Francisco, California; assess the factors facilitating or inhibiting the processes of planning policy and managing and programming integrated services; develop and test sets of guidelines and other materials for improving such processes with appropriate personnel at the levels of policy, management, and program; conduct a series of short-term training programs for a total of up to 18 sets of organizations who are ready to engage in method and process training; and share the results of these experiences with other related, interested groups. The TIOS project conducted a series of seminars and workshops on services integration during which the participants learned concepts and practiced skills to help in team building, conflict resolution, decisionmaking, interpersonal communication, and managing change. Findings and conclusions are presented as working hypotheses for the integration of services in terms of the individual, the task, the work group, the organization, and the macrosystem. A survey for project planning information, agendas, and generic models for seminars are appended.

Intergovernmental Planning Coordination: The Utah Experience.

Utah State Planning Coordinator, Salt Lake City.
Jan 75, 96p
SHR-0000524 Available from NTIS, PC$6.00/MF$3.00.

The approach and process used in Utah to provide for intergovernmental planning coordination is described. The three primary features of the Utah approach are: (1) it provides for the direct participation of affected and interested parties on an intergovernmental basis, i.e., local, State, and Federal governmental agencies as well as private citizens; (2) it encourages decisionmaking to be made at the local level to the greatest extent possible; and (3) it encourages the development of a planning process, which includes an awareness of possible future events and a common data base predicated on contingencies that can accommodate change. The system's components include: multicounty associations which work to insure that each entity within the multicounty district has a voice in local planning; the governor's advisory board on local affairs which provides the governor with counsel on problems related to the effect of State and Federal policy on units of local government; and the State Planning Advisory Committee which serves as a clearinghouse for review of applications for Federal funds, environmental impact states, and proposed State legislation. Other components are the interdepartmental coordination groups whose members participate in task forces and other activities relating to planning.

Knowledge and Action: A Guide to Planning Theory.

John Friedmann and Barclay Hudson.
California Univ., Los Angeles. School of Architecture and Urban Planning.

1973, 15p
SHR-0000601 Pub. in Jnl. of the American Inst[illegible] of Planners v40 n1 p2-16 Jan 74.

A guide to the literature of planning theory is presented as a frame of reference for students and professional planners. This paper is primarily concerned with theories which involve phenomena with which planning is concerned and considers planning as the linkage between knowledge and organized action. Planning literature is classified according to four major planning traditions: Philosophical Synthesis; Rationalism; Organization Development which focuses on ways to achieve desired changes in organizational structure and behavior; and Empiricism, which includes studies of both national planning and urban planning. Each of these mainstreams of planning theory are discussed in detail and each theory is placed in historical perspective. Two general conclusions are drawn from the review of planning theory: (1) planning cannot claim to be sustained by a coherent body of theoretical propositions; and (2) the literature of the last 20 years is characterized by coherence within the research traditions which have been established.

Meaning of 'Social' in Planning Curricula: A Review of Courses Offered in Member Schools of the Association of Collegiate Schools of Planning.

Thomas H. Logan.
Wisconsin Univ., Madison. School of Social Work.
Jun 76, 30p
SHR-0000953 Available from NTIS, PC$4.50/MF$3.00.

The context within which university schools of planning view the concept of 'social' planning is explored in a survey of course outlines and reading lists from 38 schools of planning. The university planning curriculum is viewed as consisting of three levels: the planning core, the concentration, and a specialization (e.g., health planning, within a social services planning concentration). A summary review of course content at each of these three levels is presented. The survey reveals that there is no clear distinction between planning in general and social planning (or social policy planning). It is noted that course titles are largely interchangeable, suggesting that there has not been enough time or exchange of experiences to lead to standardization of categories or labels. Perspectives vary from problems (e.g., poverty), to systems (e.g., income maintenance), to populations (e.g., the elderly), to phenomenon (e.g., social change). When planning is defined to fit within any of these perspectives, it has major features in common with traditional urban planning and modern public policy analysis. When planning is defined to fit all perspectives, it has major features in common with everything. Two lessons are drawn from the survey: (1) that 'social' in planning curricula must be defined narrowly if it is to be an area of concentration; and (2) that more sharing of experience and perceptions is required if uniformity in definitions and labels is to be achieved. A directory of schools and faculty members responding to the survey and a bibliography of books and articles included by three or more instructors in their reading lists are provided.

Michigan SITO Project Documentation. Intergovernmental Dimensions of Comprehensive Planning and Evaluation for Human Services in Michigan.

Ronald A. Uken.
Michigan Dept. of Management and Budget, Lansing.
Governor's Human Services Council.
15 Mar 74, 18p
SHR-0000139 Available from PROJECT SHARE, PC$3.50.

A planning and evaluation system is proposed which will provide for the coordination of intergovernmental programs for human services in Michigan to maximize the benefits that each level of government can offer. Based on the conclusion that Michigan's human services are fragmented at all levels, the system is designed to complement

the Federal Government's attempts to decentralize planning and management, to define the respective roles among Federal, State, regional, and local governmental units, and to broaden participation in planning and coordination between governmental units. Recommendations presented for implementation of the system include: consolidation through administrative linkages among human service bodies, definition of a comprehensive human services program structure, comprehensive need/demand assessments should be a component of human services planning, need/demand assessments should be from the bottom up, policy analysis should be a component of human services planning, and policy choices should be made through the political process. The result of the adoption of this proposed system should be the improvement of the policy formation of intergovernmental activities. However, reforming existing governmental structures which are obsolete is of equal importance. Portions of this document are not fully legible.

Model for Integrated Planning, Programming and Budgeting in a State Vocational Rehabilitation Agency. Final Report

Wisconsin Dept. of Health and Social Services, Madison. Div. of Vocational Rehabilitation.
1974, 85p
PB-243 138 Available form NTIS, PC$6.00/MF$3.00.

A model for integrating the planning and program evaluation activities of a State vocational rehabilitation agency, developed and implemented by the Division of Vocational Rehabilitation (DVR) of the Wisconsin Department of Health and Social Services, is described. The model provides for the integration of long-range planning, budget request development, operational budget development, management by objectives, and program evaluation systems for total management of the direction of a State agency. This system involves utilization of a technically skilled planning and evaluation staff to assist program managers in identifying objectives, establishing priorities, and developing performance indicators. Implementation of the system by the Wisconsin DVR required involvement of agency personnel at all levels, from central office management through clerical staff in the field service delivery offices. The model has been found to be a useful tool for management in directing the efforts of the agency, in allocating resources appropriated at the State and Federal level, and in assessing program effectiveness when making policy decisions. Flow charts accompany the narratives description of the system's development and implementation. Technical documentation is appended.

New York State's Central Social Environment Study. Social Research for Comprehensive Planning.

Matthew McDevitt and Thomas McGowan.
New York State Office of Planning Coordination, Albany.
Jan 70, 24p
PB-190 475 Available from NTIS, PC$4.00/MF$3.00.

The background and status of a project undertaken in New York State to create a social monitoring system are described. At the time of the report, the Central Social Environment Study was in the design phase in the New York State Office of Planning Coordination. The system to be developed by the study has four objectives: (1) the description of social characteristics of geographical areas (neighborhoods, communities, regions, the State); (2) the description of subgroups in society and their interactions with each other and with institutions that affect them; (3) the measurement and analysis of changes in the social condition of the State's population; and (4) the projection of probable effects of proposed government programs or other events on subgroups. Crime, mental disorder, and the problems of specific age and minority groups are examples of the social problems for which the system is to provide continuous intelligence as well as the capacity for evaluating relevant State programs. The need for the study is discussed, and the study's origins are traced. The relationship of the study to the status

of planning in general and to comprehensive planning and other government functions in New York State is considered. An outline of measurement, analysis, and evaluation methods to be employed in system development is included, as is an abstract of a seminar held to refine research strategy and design. Schematic diagrams depicting research and planning processes are provided.

Obstacles and Social Planning.

James J. Callahan.
College of the Holy Cross, Worcester, Mass.
1973, 10p
SHR-0000701 Pub. in Social Work v18 n6 p70-79 Nov 73.

Results of a study of obstacles to planning that occur when developing services for the elderly are reported. About 120 persons were interviewed in nine cities to determine which factors, activities, organizations, or persons caused the lack of achievement on the programs under consideration. In the housing area, it was found that housing authorities were merely trying to maintain the status quo. The welfare council was described as unconcerned with problems of the aged, and political authorities were seen as hostile. Similar reasons were given for the lack of homemaker services: lack of interest on the part of the welfare council, unavailability of funds, and lack of community support. The nursing home situation also prompted similar complaints. It was found that there was a major relationship between the type of actor (community, program, and aging-interest) reporting and what he reported. Aging-interest actors most frequently reported community interest and concern as an obstacle. Economic factors were reported most frequently for all program areas. However, the types of planning factors reported as obstacles appear to depend on the nature of the particular program being considered and the role the respondent plays in the situation.

On the Strategy of Social Planning.

Abraham Kaplan.
Haifa Univ. (Israel).
1973, 21p
SHR-0000732 Pub. in Policy Statement v4 n1 p41-61 1973.

The problems, aims, and the methodology of social planning are discussed in both a philosophical and a practical light. It is noted that social planning deals centrally with human values, and that these values are implicit factors in the classical problems of social welfare. There are three different problems in which the social planner is interested; the welfare problem, the human factor problem; and problems relating to human values. These problems are discussed within the context of social planning in Puerto Rico. Limits to the effectiveness of planning are described as: unplanned decisions; unanticipated consequences of actions; uncontrolled economic planning; and the inappropriate use of planning. Remedies for ineffective planning include: contingent planning, trend projection, insurance planning, and indirect planning. It is noted that planning must meet the following specifications: relevance, importance, independence, and appropriateness. Planning principles are said to include: impartiality, individuality, meeting minimum needs, distribution, continuity, autonomy, and urgency. Ends in planning are described as the things or situations striven for, and the dimensions of planning ends are seen as the amplification of a goal or objective, the achievement of certain ideals. Planning procedures are defined as specifications of practices, fiscal arrangements, physical facilities, and the like, which taken as a whole are program planning.

Overview of Human Sevice Planning in County Government and Selected Human Services Agencies in the San Francisco Bay Area.

Association of Bay Area Governments, Berkeley, Calif.
Nov 76, 25p
SHR-0001555 Available from NTIS, PC$4.00/MF$3.00.

Based on interviews with county government and agency representatives, the overview describes Alameda, Contra Costa, Marin, Napa, Santa Clara, San Francisco, San Mateo, Solano, and Sonoma counties. Community action agencies, regional criminal justice planning boards, area agencies on aging, Comprehensive Employment and Training Act prime sponsors, United Way agencies, and selected State agencies are also included. The conclusion is drawn that no actual human services system exists in the area. Several counties have undertaken or anticipate comprehensive human services planning, but there is little similarity in the approaches taken by the counties to human service planning or to service delivery. Counties have considerable interaction with agencies within their boundaries, and expressed a desire to improve communications with cities within their boundaries regarding human service issues. Agencies were found to have little flexibility in the design of new planning processes and to vary widely in the composition of their governing bodies. The agencies have close contact with the counties, but less interaction with the cities and with each other. Primary barriers to better coordination, cited by both county governments and agencies, are the lack of resources to effect coordination and the attitude of 'turf protection' on the part of all involved.

Phase II: Comprehensive Plan Alternatives.

Springsted, Inc., St. Paul, Minn.
Sep 74, 44p
SHR-0000534 Available from NTIS, PC$4.50/MF$3.00.

Human services planning is addressed in a comprehensive plan report prepared for three counties (Brown, Nicollet, and Sibley) in Minnesota. A needs assessment survey was carried out and current service components existing in both public and private sectors were examined. This process resulted in the identification of major delivery problems associated with human services planning and activities of the Human Service Board in the three-county area. The board accepted these identified problems as being legitimate areas of concern, although its positive reaction was modified by a number of political, operational, and fiscal factors, including time constraints, fear, lack of a sense of urgency, lack of specificity in current deficiencies, and uncertainty concerning prospective State legislation. Alternative approaches for human services planning were identified in the comprehensive plan report for consideration by the Human Service Board: (1) accepting the status quo as a more desirable option than a new system; (2) utilizing the Human Service Board as a planning vehicle until such time as more visible benefits became available through legislative action; (3) utilizing an operational Human Service Board at the multicounty level and integrating four or five selective programs; and (4) integrating services on an individual county basis.

Picket Fence Planning in California: A Study of Local Government Planning.

Steven A. Waldhorn and Edward J. Blakely.
Standford Research Inst., Menlo Park, Calif.
Nov 76, 65p
SHR-0001534 Available from NTIS, PC$5.25/MF$3.00.

The status of local — level planning in California is assessed in a report based on field studies of 12 cities and counties, interviews with State — level officials, and a survey of 200 cities and counties. Findings are presented on local needs in community development, the dimenishing availability of resources for local governments, and inadequate planning processes at the local level. The status of local planning is assessed in the areas of State — mandated General Plan development, community development planning, budget planning, and other kinds of planning. Approaches to improving local planning taken by three communities are described. Local government planning in California is viewed by most local management officials as ineffective. Local planning processes usually are fragmented. The State's General Plan Law, which is intended to structure

local planning efforts, has generated unnecessary work for local governments. Budget planning in most locales is too short-ranged, seldom includes citizen participation, and is seldom linked to local planning objectives. Impediments beyond the control of cities and counties (e.g., shortage of Federal funds) are the most important barriers to the achievement of local planning objectives. Recommendations for improving local planning processes relate to revised State planning statutes, incentives for effective planning, assistance from public interest groups, and coordination of State and local plans.

Planning and Coordination of Social Services in Multiorganization Contexts.

Stephen M. Davison.
Chicago Univ., Ill.
1975, 21p
SHR-0000936 Pub. in Social Service Review v50 n1 p117-137 Mar 76.

An approach is provided to the systematic consideration of proposals for interorganizational coordination. The following interorganizational relationships are identified: communication, cooperation, coordination or confederation, federation and merger. A three-stage planning framework is designed to assist in determining whether a coordinated approach to a problem is viable. These three steps are: (1) consider external factors in the environment, particularly the preconditions for interorganizational relationships; (2) examine organizational characteristics which affect the organization's need or ability to respond to challenges in the environment; and (3) address the factors which affect the planning process through which the nature of interorganizational relationships are worked out. Environmental factors to be considered in the planning framework are: the economy, political pressure, legislation, availability of funds, and demographic trends. Organizational characteristics include resources, domain, and interdependence. Interorganizational process factors to be addressed involve: the structure of the interorganizational group, history of the interorganizational group, role conflict of members of the interorganizational group, behavior of individuals in groups, and leadership.

Planning and Human Need.

Phil Heywood.
Gloucestershire Coll. of Art and Design, Gloucester (England). Dept. of Planning.
1973, 196p Executive Summary available from PROJECT SHARE.
SHR-0000604 Available from Praeger Publishers, 111 Fourth Ave., New York, N.Y. 10003.

Municipal planning is examined in relation to human needs. Consideration is given to the planning of housing, work, movement, and the face of a city, and methods are suggested for finding an approach to planning that avoids the sacrifice of human values and social satisfactions to economic efficiency. It is contended that citizen consultation in strategic decisions and participation in local ones are essential in making cities more responsive to human desires and demands. The monopolization of planning by any individual or group is discouraged, and true participatory planning is considered to involve the equitable distribution of wealth and power and recognition of resource limitations. Recent planning activities such as large public housing projects, wholesale destruction of housing for urban renewal programs, and rigid master plans are believed to be ineffective planning tactics. A positive outline is offered for planners to follow, with emphasis on a national housing policy that develops a comprehensive plan which is responsive to local needs and innovative enough to use existing structures. It is argued that a system of mass transportation is needed to end overdependence on automobiles and urban sprawl. A list of references is provided.

Planning and Organizing for Social Change: Action Principles from Social Science Research.

Jack Rothman.

Michigan Univ., Ann Arbor. School of Social Work.
1974, 632p
SHR-0000570 Available from Columbia University Press, 562 W. 113th St., N.Y., N.Y. 10025.

Results are presented of a literature search of articles from 30 selected journals published between 1964 and 1970 to provide a core of basic social science research knowledge for social planners and community workers in a variety of human service fields. Almost a thousand research studies in the fields of applied anthropology, political science, psychology and social psychology, sociology, adult education, city planning, community mental health, public administration, public health, and social work were reviewed, codified, and given an applied formulation. The book, which is divided into seven sections, presents an overview of existing models of research retrieval studies and discusses the methodology and presentation format used. Practitioner roles are examined in terms of variables affecting role performance and dynamics. Contextual factors and technology and personnel relating to organizational behavior are reviewed, and the community setting of social change is explored in the light of political and legislative behavior. The section concerned with citizen participation in social change considers voluntary associations and primary groups, social movements, political action, and client organization. Two social change processes involving the diffusion and adoption of innovations and the movement and assimilation of populations are discussed, and the final section spans the distance between theory and practice. Five sections provide individual bibliographies and the appendices present details on methodology, a modified study report form, and indexes of subjects and names.

Planning for Local Human Resources Development.

Missouri Municipal League, Jefferson City.
1973, 21p
SHR-0000193 Available from NTIS, PC$4.00/MF$3.00.

Because of the expansion of the role of the cities in planning and delivering human resource programs previously administered by other units of government, a guide to planning for local human resources development is provided by the Missouri Municipal League. Suggested steps in initiating local human resources programs involve formal and informal communications efforts. Practical recommendations for determining the focal point of need include gathering data to define the gap between needs and resources and developing a responsive program in relation to needs. Alternative approaches to organizing for human resources development are proposed. An agenda for implementation, possible seminar topics, and a bibliography are included.

Planning for the Elderly: A Regional Approach.

Northern Kentucky Area Development District, Florence.
Jun 76, 157p Executive Summary available from PROJECT SHARE.
SHR-0001526 Available from NTIS, PC$8.00/MF$3.00.

Program planning to meet the needs of the elderly in the Northern Kentucky Area Development District (NKADD) is addressed. The planning document is based on a needs assessment survey conducted to evaluate the following areas as they relate to the well-being of the elderly: health, income, social and psychological needs, transportation, housing, nutrition, crime, and education. A regional approach to planning in the district is described for fiscal year 1977 - 1978. Procedures employed in the needs assessment survey are detailed. The total number of completed interviews was 607. When asked to identify the most important daily problems, the three areas of perceived need expressed by the elderly were health, economics, and social and psychological concerns. Economic factors such as inadequate in-

come, the high cost of living, and unemployment were causitive factors for certain health issues and transportation problems of the elderly. The major medical care problem was identified as the cost of medical care, including physician fees and the cost of medicines. Goals and objectives of the NKADD regional plan for meeting the needs of the elderly and delineated. A time-frame approach to program planning is incorporated in the plan. The evaluation format to be used by NKADD for all program areas is described. The program plan for implementing Title III during fiscal year 1977-1978 is presented. Appendixes list needs assessment objectives by functional element, contain the elderly needs assessment survey form, and present the results of the survey by county of residence.

Planning Manual for the Preparation of the Wyoming Comprehensive Annual Services Program Plan.

Wyoming Dept. of Health of Social Services, Cheyenne. Div. of Public Assistance and Social Services.
Apr 76, 79p
SHR-0001250 Available from Research Group, 1230 Healey Bldg., 57 Forsyth St., NW, Atlanta, GA 30303.

A manual is presented to guide Wyoming social service planners in the preparation of the comprehensive annual services program (CASP) plan in accordance with the Social Services Amendments of 1974 to the Social Security Act (Title XX, P.L. 93-647). Though directed primarily to planners within the Division of Public Assistance and Social Services of the State's Department of Health and Social Services, the manual is also intended as an aid to planners in other agencies whose efforts relate to social services planning. The purposes of the manual are to enable the CASP to be compiled each year regardless of changes in personnel, to improve the CASP from year to year, and to provide a repository of information needed for effective social services planning. The manual is product-oriented in that it describes the sections or chapters of the annual plan, their proposed content, and a schedule for the preparation of each section. The following plan components are covered: introductory material; social services under Title XX; planned social services; purpose, goals, and objectives; planning; needs assessment; reporting and evaluation; organizational structure; program coordination and utilization; individuals to be served; schedule of income eligibility; compilation of social services; support functions; financial summaries; the plan adoption process; and appendices. A summary of the steps required to prepare the plan, including task descriptions and staff assignments, and a timetable for plan preparation are provided.

Planning 1968. Selected Papers from the American Society of Planning Officials National Planning Conference.

American Society of Planning Officials, Chicago, Ill.
1968, 322p
SHR-0001539 Available from American Society of Planning Officials, 1313 E. 60th St., Chicago, IL 60637.

The emphasis of the conference was on urban problems and dilemmas and on planning approaches to these problems. In the introductory lecture, it was noted that planning is moving away from a technological exercise and into the area of a major managerial undertaking. The greatest single issue in planning was concluded to be the sharing of power. The issues addressed in the papers presented are: city planning and the riot-torn city; the relationships of advocacy planning, participatory democracy, and representative government; reconciling planning decisions and political choices; planning as an instrument of social change; approaches to public intervention; and social indicators. Additional papers dealt with public planning and the private economy, complementary planning systems, education for community service, social goals, a political agenda, and urban design. Specific examples in solving metropolitan and regional issues in the Bay Area of California are cited, and trends in State planning are noted. Conservation versus economic development, and the clash of values between

suburb, city, and region are discussed. The annual business meeting of the society is included. Conference was held in San Francisco, Calif., May 4-9, 1968.

Planning, Participation and the Purchase of Service: The Social Impact of General Revenue Sharing in Seven Communities.

Paul Terrell and Stan Weisner.
University of Southern California, Los Angeles.
Regional Research Inst. in Social Welfare.
Nov 75, 198p Executive Summary available from PROJECT SHARE.
SHR-0000704 Available from NTIS, PC$9.00/MF$3.00.

The impact of general revenue sharing on social planning and social programs in seven sites deliberately chosen for their innovative use of funds is analyzed. The investigation illustrates ways in which cities and counties can use revenue-sharing funds to improve community welfare. The use of revenue sharing for community welfare programs is termed social revenue sharing, a concept intended to describe the content of new systems of community involvement, planning, and administration for social welfare. Characteristics of social revenue sharing are delineated, and social issues involved in revenue sharing are discussed. In the seven study sites, a 'best case' methodology was employed to examine revenue-sharing developments. The following sites were selected for study: San Diego, California (both city and county); Orange County, California; Los Angeles County, California; Seattle, Washington; Lane County and Eugene, Oregon; Alameda County, California; and Hayward, California. Data collection was accomplished during 1975. The case study analysis for each study site focuses on three principal elements of revenue sharing: social planning, citizen participation, and service collaboration between public and private entities via purchase of service contracts. The initiation of revenue sharing is addressed, along with formative decisions involved in social revenue sharing. Study findings are presented which support the thesis that unrestricted funds will strengthen local government and stimulate democratic participation. It is concluded that resources, capacities, and values existing at the local government level can sustain an independent social policy realm apart from special Federal pressures and incentives.

Planning Theory.

Andreas Faludi.
Technische Hogeschool, Delft (Netherlands).
1973, 317p
SHR-0000683 Available from Pergamon Press, Inc., Maxwell House, Fairview Park, Elmsfor, N.Y. 10523.

Planning theory is discussed as an intellectual endeavor to solve problems which planners face when trying to decide which type of planning agency and which procedure will best serve the goals of planning. Planning theory is organized so as to distinguish between normative and positive theories of planning, with major emphasis placed on planning studies in the first category. Four aspects of planning are considered: (1) definition of planning theory (problems in planning theory and underlying theory models); (2) conceptual framework for planning thought (rationale of planning theory, model of planning agencies, operations of planning agencies, and limitations of and approaches to rational planning); (3) positive theories of planning (blueprint versus process mode of planning, rational comprehensive versus disjointed incrementalist mode of planning, normative versus functional model of planning, and the planning environment and styles of planning); and (4) politics of rational planning (multiplanning agencies, decisionmaking in planning agencies, organization of planning departments, and implementation of planning programs). This document is Volume 7 of the Urban and Regional Planning Series.

Planning with the Aging: A Process Approach. A Technical Assistance Monograph.

Neal S. Bellos, Darrell Slover, and Anna L. Babic.
Syracuse Univ., New York. School of Social Work.
Oct 71, 36p
SHR-0000547 Available from National Council on the Aging, 1828 L St. N.W., Washington, D.C. 20036.

Background issues are delineated which can be used as a basis for community action programs designed to serve the needs of the elderly population. Characteristics, needs, and resources of the elderly population are discussed, including the effect of the aging process on needs, barriers imposed by society which prevent the fulfillment of needs, and basic human requirements which involve both physiological and security needs. Higher-order needs are also noted, including love and belonging needs, esteem needs, and self-actualization needs. Resources which the elderly possess for meeting their basic and higher-order needs are examined in the context of three basic principles: (1) aging is a developmental phenomenon; (2) individual differences are maintained throughout the life cycle; and (3) development (and aging) is shaped by the social context in which it occurs. Problems in meeting human needs are noted to include financial resources, help and concern from others, involvement in society, physical resources, intelligence and special aptitudes, training and experience, and time. It is concluded that meeting the needs of the aging through community action agencies has several important ingredients. The first requirement is the decision to include the aging in an agency's activities. Recognizing that older persons are faced with the barriers of society, it is suggested that planning pay particular attention to the involvment of the aging, goal setting, information coordination, maximization of resources, and staffing. A bibliography is provided.

Preparation and Format for State Social Service Program Plans in Social Services Planning. State Experiences and Suggested Approaches in Response to Title XX of the Social Security Act.

Gerald T. Horton and Victoria M. Carr.
Research Group, Inc., Atlanta, Ga.
Sep 76, 93p
SHR-0001541 Available from Research Group, Inc., 1230 Healey Bldg., 57 Forsyth St., NW, Atlanta, GA 30303.

The preparation process for the Comprehensive Annual Social Services Program Plan under Title XX of the Social Security Act is described. This manual is designed to assist administrators and planners in describing key issues and compiling information obtained during the planning process into a readable and informative plan. The plan's audience and purpose are described, as are work tasks necessary for plan preparation, scheduling of events, major components, and backup information to be included in the plan. The material was drawn from eight case studies of State experiences in social services planning in response to Title XX. The relation of the social services plan to the planning process is considered. A step-by-step guide to preparation of the plan is provided. Experiences from the eight States studied are used to illustrate various aspects of plan preparation. A compilation of several State plans includes chapters on descriptions of social services programs, service eligibility and use of fees, organization and delivery of services, suggested plan format, and citizen participation.

Present Status and Future Directions of the Human Services Planning and Coordination Project.

Maryland Dept. of State Planning, Baltimore.
Dec 74, 75p Executive Summary available from PROJECT SHARE.
SHR-0000085 Available from NTIS, PC$5.25/MF$3.00.

The status of the Human Services Planning and Coordination Project of the Maryland Department of State Planning, designed to provide a framework for reviewing and analyzing services needed by Maryland citizens, is assessed. A study design

for the Project was developed by a committee of persons representing Federal, State, local, and regional agencies; nongovernmental agencies provided input and continue to participate. The Human Services Task Force was formed to provide information, review reports, and provide liaison with State, regional, and local agencies. A classification scheme for analysis of need and resource information based on an activity sector/target population framework was devised. This framework also serves as a method for categorizing information. An inventory of all State human service programs was compiled and agency interviews were conducted to determine current departmental planning activities and the extent of interagency cooperation. Social indicators which can aid in the identification of need are currently being developed. Other aspects of the Project which are still in the developmental stage are involvement of the Executive Department in the planning process, information about volunteer services, identification of issues by activity sector, and an evaluation mechanism. Plans for 1975 include planning seminars and agency staff augmentation. The appendix contains the classification scheme and a roster of Task Force members.

Program Profile: Community Planning and Development.

Council for Community Services, Inc., Providence, R.I.
Apr 75, 38p Executive Summary available from PROJECT SHARE.
SHR-0000332 Available from PROJECT SHARE, PC$4.00.

The status of community planning and development in the State of Rhode Island is analyzed by the Rhode Island Council of Community Services, Inc. In Rhode Island, there are an estimated 42 State plans related to human services programming, and every agency, program, or service has some form of planning as a component of administration. However, for this report an effort is made to identify those agencies which have an identifiable program component or emphasis which deals with more than internal administrative matters. Categorical funding usually carries with it two or three planning requirements. Among the larger programs involving State plans is the Rhode Island Department of Mental Health, Retardation and Hospitals. According to various plans affecting the department, a comprehensive community mental health center has been completed; plans for a second facility have been drawn; and programs have been provided for the following: alcoholism, retardation, cerebral palsy and epilepsy. The plans and activities of the State Departments of Community Affairs, Education, Health and Statewide Planning, and so forth are discussed. At present planning activities within these State agencies are fragmentary, poorly coordinated, primarily short range, and highly categorical. As these factors are becoming recognized, State efforts have been begun to integrate services and planning. Portions of this document are not fully legible. Related documents include SHR-0000333, SHR-0000334 and SHR-0000335 available from PROJECT SHARE.

Public Planning: Failure and Redirection.

Robert A. Levine.
Rand Corp., Santa Monica, Calif.
1972, 215p
SHR-0000784 Available from Basic Books, Inc., Div. of Harper and Row, Scranton, Pa. 18512.

Reasons for the ineffectiveness of public programs in the United States are investigated, and planning recommendations are made to improve the operation of governmental programs. It is hypothesized that public programs have failed because they are designed in relation to the policy objectives established by operational planners. Various administrative levels must fulfill these policy objectives according to a hierarchy of rules and, in the process of interpretation, original policy objectives may be confused or even reversed. It is recommended that an attempt be made to use individual and organizational incentives to interpret policies down to operating levels, using a minimum amount of rules. In this manner,

policy objectives can be effectively advanced through public programs. The market system is cited as one example which involves the use of incentives rather than rules to move in a socially desirable direction. It is suggested that market techniques might be used to reach a range of policy objectives and that objectives designated by public policy might be furthered by changing the structure of bargaining or political power. Within public bureaucracies, bureaucratic incentives might be used although less is known about bureaucratic motivations than about either market or political incentives. The emphasis on incentives is related to decentralization. It is felt that decentralization of public policies may not be effective if it is not coupled with incentives that encourage decentralized components to work toward common objectives.

Readings on Human Services Planning. A Selection of Writings on the Subject of Human Services Planning.

Gerald T. Horton, Carol J. Latta, Marian Glustrom, and Joan Hutchinson Miller.
Research Group, Inc., Atlanta, Ga.
Sep 75, 176p Executive Summary available from PROJECT SHARE.
SHR-0000316 Available from The Research Group, Inc., 1230 Healey Building, Atlanta, Ga. 30303.

A selection of writings on the subject of human services planning is presented in this anthology prepared by the Human Services Institute for Children and Families, Inc. The fourteen articles reviewing human planning literature since 1968 examine: a definition of human services and their classification into case services and public social utilities; why social planning is necessary in terms of program development and project design; obstacles to social planning; and the eight tasks that form the planner's job. Other topics included are: organizational aspects of human services planning and the characteristics of planning organizations; a description of the professional characteristics of the planner; and an outline of a proposed State human services planning system. The intergovernmental dimensions of human services planning are considered, as seen from the State governmental level. Use of research in planning is discussed, including social indicators and their use as measuring tools. A definition of needs assessment is given, and information that should be included in a general needs assessment is identified. The characteristics of a useful information system for human services planning and decisionmaking is included, together with a paper dealing with the concept of citizen participation in any public activity. The final article presents a philosophical and theoretical discussion of planning within an intellectual tradition and framework.

Region Two Human Resources Study and Preliminary Recommendations.

Alice Mack.
Larimer - Weld Regional Council of Governments, Loveland, Colo.
Jun 75, 116p Executive Summary available from PROJECT SHARE.
SHR-0000284 Available from NTIS, PC$6.50/MF$3.00.

The results of a survey of 55 Federal, State, county, and private human service — related organizations in Larimer and Weld Counties, Colorado, are reported, and recommendations concerning human services programs and planning are offered for consideration by the Larimer - Weld Regional Council of Governments. Data, observations, and recommendations are organized to reflect the question format of the inventory survey instrument. Information presented includes: agency names and general description of services provided; socioeconomic and age characteristics of client population; numbers of clients served; financial and budgetary information; staffing and use of volunteers; agency guidelines and regulations; equipment and internal management; forms, procedures, evaluation, and follow-up; boards and advisory councils; methods of data collection; problem areas with regard to service delivery; community relationships; service duplications and overlaps; and unmet needs. From observations in each of the above areas, the general conclusion is drawn that

no human services system actually exists in the two counties. There is rather a group of fragmented components and a multiple-problem situation stemming from the presence of multiple funding authorities and levels of accountability. It is concluded that drastic change is called for, including building a new system of funding relationships creating new planning and management processes. Toward this end, recommendations are presented in two categories: (1) services integration recommendations, involving State and Federal governments; and (2) interim or local recommendations. A copy of the resource inventory questionnaire is included.

Regional Human Resource Development Project. Phase I Report.

Greater South Texas Cultural Basin Commission, Austin.
Jun 76, 197p Executive Summary available from PROJECT SHARE.
SHR-0001208 Available from NTIS, PC$9.00/MF$3.00.

The first year's activities of a project aimed at developing human service planning and management capacity in the South Texas region are reported. The Regional Human Resource Development Project, undertaken by the Greater South Texas Cultural Basin Commission, is concerned specifically with overcoming the socioeconomic problems in a 40-county area of South Texas characterized by high unemployment, a surplus of unskilled labor, a low level of education attainment, and a lack of economic growth. Furing the first year of the project, a planning process was established and the groundwork was laid for developing a comprehensive plan. The commission and the Basin's five regional councils of governments serve as mechanisms for integrated, comprehensive human resource planning. The Phase I report contains an overview of the Basin area (population characteristics, economic and employment conditions, education, health, housing, transportation); a summary of needs and priorities by age groups, based on needs assessments conducted by Basin councils of governments; and an inventory of human services in the Basin, with emphasis on the services provided by the State's six major human service agencies. Recommendations are presented in the areas of economic development, education and manpower, health, transporation, A-95 review and comment, public awareness, and interagency coordination. Supporting tabular data are appended. See also Phase 2 report, SHR-0001731.

Report and Recommendations of Joint Planning and Coordinating Action Unit.

Ramsey County Human Resources Planning Council, St. Paul. Minn. Joint Planning and Coordinating Action Unit.
1973, 34p
SHR-0000265 Available from NTIS, PC$4.50/MF$3.00.

Recommendations are reported of a Joint Planning and Coordinating Action Committee charged with reviewing and establishing priorities among social service programs in St. Paul, Minnesota. Information about 87 service programs whose funding would be affected by changes in Federal funding patterns was collected from agency reports and resource people knowledgeable in the service area. Criteria or rating elements were applied for comparative analysis of the objectives, authorization, efficiency, and benefits of each program area, and an assessment of the area's essentiality. Ranking was achieved by statistical analysis of the rating elements. The ranking of programs in order of priority is: (1) day activity centers for the mentally retarded; (2) alcohol and chemical dependency programs; (3) related health services; (4) programs for the elderly; (5) child day care; (6) summer youth employment; (7) neighborhood service centers; (8) information and referral services; (9) family services programs; and (10) advocacy. The Committee also found that the objectives of all program areas are attainable, but the inability to measure objectives is questionable, and in most program areas there is an inadequate program evaluation that measures benefit or goal progress. Appendices contain an explanation of the rating elements and a tabular rating of each program area.

Report to the St. Paul Council of Planning Entities on Development of a System for Linkage of Planning in Human Services.

Dan MacDonald and Associates, St. Louis, Mo.
May 76, 94p Executive Summary available from PROJECT SHARE.
SHR-0001006 Available from NTIS, PC$6.00/MF$3.00.

Responses to the concept of unifying human service planning were sought from agency executives and political and civic leaders in Minnesota in order to develop a system for linkage in planning for human services. The goal of the survey was to achieve an effective and efficient system for all delivery of human services to meet the needs of all citizens and communities in Minnesota. Three specific purposes of the linkage program were to supply all direct service providers with competent planning, research, and development assistance required to enable them to carry out their designated missions; to establish a working mechanism to effectively link planning authorities and agencies in human services and the providers of human services in cooperative and coordinated planning; and to provide a system to permit policymakers (both public and voluntary) in human services to make decisions on program development and funding, with the assurance that such decisions are in the best interest of a community. The concept of unifying human service planning was viewed favorably by respondents in the survey. There was a strong profession of interest toward action to undertake such a program. Only a few interviewees opposed the idea of a central planning and linkage system for human services in Minnesota. There was a majority feeling that a central governing body should contain a proper balance among elected officials and those from the private sector. Interviews with those persons in a position to provide funding for integrated planning were almost entirely positive in nature. Most respondents felt that a division of labor among major planning agencies would be desirable in the linking of and planning for human services in Minnesota. An appendix defines human services, planning, and social planning. A list of references is provided.

Research and Human Services: A Guide to Collaboration for Program Development.

David Twain, Eleanor Harlow, and Donald Merwin.
Jewish Board of Guardians, New York. Research and Development Center.
Sep 70, 102p
SHR-0000681 Available from the Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402.

The role of research in planning for human services programs is discussed, based on conference discussions and special papers primarily in the field of crime and delinquency but with implications for any area of human service. It is noted that research has not always been of value to human services agencies. Social science and the field of human service involve two sets of activities with different values and orientations. In the human services field, research and development have not received the same degree of attention as they have in technological fields, business, and industry. Two tasks are identified which must be accomplished in solving social problems through research: (1) set up structures for the support of ongoing research; and (2) maintain the viability of research and program development by resolving differences in attitude, overcoming social and institutional inertia, and negotiating a workable arrangement. The importance of research and program teams in negotiating and planning for research is examined, and various types of research are described in terms of their purpose and design. Steps involved in the initiation and conduct of a research program are outlined. The effective use of research findings is considered.

Retracking America: A Theory of Transactive Planning.

John Friedmann.

California Univ., Los Angeles. School of Architecture and Urban Planning.
1973, 306p
SHR-0000607 Available from Doubleday and Co., Inc., 245 Park Ave., New York, N.Y. 10017.

A theoretical basis for transactive planning is presented. One of the major premises of the book is that the process of societal guidance is too important to be left entirely to experts. Guidance activities must extend to schools, farms, factories, offices, and neighborhoods where they will draw increasing numbers of people into a direct engagement with their society. An attempt is made to outline the elements of a theory of societal guidance in which historical, logico-empirical, and utopian aspects are brought into conjunction. Among the specific apsects of transactive planning discussed are: planning as a social process; innovative planning; societal guidance and transactive planning; influence of Karl Mannheim on planning theory (sociology of knowledge, forms of rationality, theory of controls, and scientific politics); forms and styles of planning; planning in a post-industrial society; uses of transactive planning in the future; consideration of development in planning as innovation (individual choice and collective phenomena, guidance system performance evaluation, and need for structural change); transactive style of planning (communication, mutual learning, and transactive planning in the context of society); and design for guidance in transactive planning and education in social change. An annotated bibliography on societal guidance and planning is provided.

Rural Planning Specialist: A Unique Approach to the Problems of Poverty in Rural America.

Pennsylvania Dept. of Consumer Affairs, Harrisburg.
1973, 127p Executive Summary available from PROJECT SHARE.
SHR-0001182 Available from NTIS, PC$7.25/MF$3.00.

Guidelines are presented for the implementation of rural planning specialist (RPS) projects to assist rural communities in developing their human and organizational resources. The manual is based on the experiences of a Pennsylvania demonstration project in which four specialists were placed in four rural areas to increase the sensitivity of local citizens to the health and welfare needs of their area, to plan and implement health and welfare services, and to initiate improved or expanded services. The purpose of the manual is twofold: (1) to present to organizations concerned with social services in nonmetropolitan areas as example of outreach that might be adopted to improve the effectiveness of such organizations; and (2) to assist outreach workers by suggesting methods of gaining entrance into a community, mobilizing citizens, and implementing programs. The first section outlines the structure of the Pennsylvania project; defines the role and responsibilities of the RPS; describes the factors involved in administering an RPS program (organizational structure, agency procedures, salaries); offers guidelines for recruiting the RPS; suggests experience, background, and personal characteristics that might be sought in RPS candidates; and presents guidelines for placing the RPS program in a community. The second section opens with several general guidelines to assist the RPS in becoming involved with the community. Six generalized steps in the RPS process — introduction and inventory, initial project, working with the community, defining a problem situation, working toward change, and leaving the community — are defined, based on the experiences and comments of Pennsylvania RPS. Activities, methods, and guidelines relevant to each step are included, and examples of RPS activities illustrative of each step are provided. Chronologies are presented for several RPS programs, including a program for providing senior citizens with flood relief, development of a community health foundation, development of a senior citizen areawide organization, a rural transportation program, and others. For each, a step-by-step account is given of the RPS's activities. Supporting documentation is provided.

Service Integration — The Evaluation of the Service Integration Project of the

Human Resources Planning Coalition of Greater Duluth, Inc.

William A. Fleischman.
Minnesota Univ., Duluth. Dept. of Sociology and Anthropology.
June 73, 112p Executive Summary available from PROJECT SHARE.
PB-239 783 Available from NTIS, PC$6.50/MF$3.00.

The use of coalition as the prime vehicle for human services integration is examined in this evaluation of the Service Integration Project of the Human Resources Planning Coalition (HRPC) of Greater Duluth. The projects developed represent the Coalition's effort to fulfill five primary functions: (1) coordination of and among planning agencies and service delivery agencies; (2) planning for filling gaps in services and for improvement of existing services (including formulating policy and assisting with implementation); (3) provision of technical assistance to agencies in the areas of administration, planning, data collection, and evaluation; (4) provision of data base/information system support; and (5) evaluation of the efficiency and effectiveness of programs. The evaluation of the Project was based on interviews with HRPC Staff, directors, and Board members, and with personnel of the participating agencies. Results of the evaluation indicate that a voluntary coalition such as HRPC has little potential for assuring the coordination of agencies. Factors accounting for the low impact of the coordinating efforts HRPC are discussed, and two alternative models to the voluntary coalition are proposed. General discussions of the service integration concept and process are provided. The five projects described and evaluated are: Manpower Project, Youth Development Project, Public Assistance Vocational Rehabilitation Project, Human Development Center and Family Services Project, and Aging Project. Appendices include the evaluation instruments, Community Services Survey Recommendations, and excerpts from HRPC bylaws.

Social Planning and Decision Making in Washoe County, Nevada. Volume 1.

Community Services Agency of Washoe County, Reno, Nev.
Dec. 74, 73p Executive Summary available from PROJECT SHARE.
SHR-0000702 Available from NTIS, PC$5.25/MF$3.00.

The capacity-building research project in Washoe County, Nevada is described, and a decisionmaking model to increase the information available in setting priorities and allocating resources is proposed. The history and governmental structure of Washoe County are outlined to provide background information. This proposed model for decisionmakers is discussed as a four step process: needs assessment, policy conference, priority setting, and resource allocation (A-95 review process). Social planning support requirements are listed, including mechanisms for monitoring services and information exchange. A 1975 action plan for Washoe County is presented, based on a summary of human needs in the county. Recommendations are offered for the implementation of the decisionmaking model, for the establishment of the social planning unit, and for actions to meet human service needs. The technical appendices to this volume are contained in Volume 2, which is available as SHR-0000703.

Social Planning and Decision Making in Washoe County, Nevada. Volume 2. Technical Appendices.

Community Services Agency of Washoe County, Reno, Nev.
Dec 74, 69p Executive Summary available from PROJECT SHARE.
SHR-0000703 Available from NTIS, PC$5.25/MF$3.00.

Four technical appendices are presented to provide backup information for the main body of a report which appeared in a separate volume. Directions for use of a standardized data collection form and a copy of the form itself are in-

cluded. Another appendix provides a format for the Washoe County interagency newsletter, which was designed as a communication tool for use by officials, agencies, and the public. The basic data report for Washoe County is also included as an appendix. It provides a needs assessment for social service agencies and local elected officials for fiscal year 1975-1976. The report contains sections on population, economic, and housing characteristics; planning areas; high priority planning areas; and fiscal activity. The final appendix presents maps illustrating socioeconomic indicators for education, income, housing, age, and crime. A map of composite socioeconomic indicators is also included. Volume 1 is available as SHR-0000702.

Social Planning and Policy Analysis: A Selected Bibliography.

Darrell F. Williams.
Iowa Univ., Iowa City. Graduate Coll.
Jul 76, 31p
SHR-0001462 Available from Mrs. Mary Vance, Editor, Council of Planning Librarians, P.O. Box 229, Monticello, IL 61856, Exchange Bibliography No. 1078.

Writings on social planning and policy analysis are cited in a bibliography prepared for a graduate seminar in social planning. Topical headings are: (1) an introduction to social policy, social planning, and the study of social purposes; (2) the ideological context of American social policy; (3) social planning and social theory (including theories of the social system and of social change); (4) choice of social objectives in social planning; (5) education and social planning (school inequality in the welfare state, political economics of educational inequality, education as a form of social planning, education, public policy, and structural transformation); (6) work, the labor force, and manpower policy (labor force participation and exclusion, implications of manpower policy for social planning, social planning and the political economy of public service employment, problems and policies of manpower for local government); (7) methods of analysis for social planning (economic analysis for education planning, methods and indices relevant to employment and earnings inadequacy, cost-benefit and cost-effectiveness analysis for social planning, facet analysis and the planning context, systems analysis for social planning and public policy decisions); and (8) social planning and urban development. Each section includes an introductory paragraph reflecting the context of the seminar for which the bibliography was prepared. Approximately 250 books, articles, and other materials are cited.

Social Planning and Social Change.

Robert R. Mayer.
North Carolina Univ., Chapel Hill.
1972, 165p Executive Summary available from PROJECT SHARE.
SHR-0000606 Available from Prentice-Hall, Inc., Englewood Cliffs, N.J. 07632.

A model is developed for problem solving through social - structure change or alterations in the pattern of relationships existing among people involved in a given situation. Following a review of attempts to conceptualize social planning, the nature of social - structure change is examined to determine its distinguishing characteristics and to delineate the nature of social change as developed in the model. Case studies which involve changes in the membership of social structures, changes in the set of roles of a given structure, and changes resulting in a redistribution of the rights and obligations inherent in status are analyzed. These analyses are based on two questions which are fundamental to the construction of a planning model: (1) how are problems translated into social - structure terms; and (2) what tools of intervention are available to accomplish social - structure change. Several steps in the conceptualization of social problems in structural terms are identified: the social problem must be identified; the system of social relationships in which the problematic behavior takes place identified; and analysis made of alternative means of changing the structural feature which sustains the undesirable state. A discussion of the implica-

tions of the conceptual model for practice and education in the socially-oriented professions is included.

Social Policy Analysis as the Interpretation of Beliefs.

Martin Rein.
Massachusetts Inst. of Tech., Cambridge. Dept. of Urban Studies and Planning.
1971, 14p
SHR-0000900 Pub. in American Institute of Planners Jnl. v37 n5 p297-310 Sep 71.

The partisan nature of policy analysis is examined, and the ways in which beliefs intrude at each level of analysis are illustrated. Social policy is concerned with choices among competing values, and the study of social policy involves the interaction between values, operating principles, and outcomes. Values intrude into the analysis of policy in the following ways: definition of the purposes of policy; assignment of priorities; translation of beliefs into policy by institutional forms; evaluation of outcomes; and assessment of politically feasible changes in policy. Much of traditional policy analysis is based on procedural values which emphasize pragmatism and progress. Alternative approaches include the predicition of feasibility and strategies to promote feasibility. It is concluded that there are no true analyses, but that every policy analysis must be within the framework of its value assumptions.

Social Policy and Social Services.

Alfred J. Kahn.
1973, 220p
SHR-0000621 Available from Random House, Inc., 201 E. 50th St., New York, N.Y. 10022.

An introduction to the concepts and organization of the social services is presented with an emphasis on policy options facing general social services. An overview of general social services is provided which defines social services as communal provisions to promote individual and group well-being and to aid those in difficulty. Costs and expenditures for social services are examined in terms of special programs and personnel. It is noted that almost all general social services may be considered both quantitatively and qualitatively inadequate. Social service policy is discussed in general terms and in an institutional context. Specific techniques available to assure access to services and supporting developments in organization and staffing are described. It is recognized that the desirability of using social service programming for its potentially redistributional effect is subject to broad differences of opinion. The concept of the economic market, its mechanisms, and its place in the social services field are explored. The relationship between program and policy is discussed, and several policy and programming models are developed. A reading list is appended.

Social System Models for Planners.

Robert R. Mayer.
North Carolina Univ., Chapel Hill.
1972, 10p
SHR-0000795 Pub. in AIP Jnl. v38 n3 p130-139 May 72.

Five models of social systems are discussed which may be used by planners to formulate goals and policies for solving social problems. Three basic elements of the five different models are emphasized: (1) level of the social system (macro versus micro); (2) structure of each model; and (3) integrative mechanisms peculiar to each model. Basic elements of Parson's microcollectivity model are individual actors rather than groups of actors or systems and, in this sense, the model is a microsystem. Ramsoy's macrocollectivity model distinguishes between two macrosystems. The first conforms to the definition of collectivity in that the social system is characterized by having an inclusive goal and share values. The second is defined on the basis of integrative mechanisms and is not viewed as a collectivity. Blau's ex-

change system model applies primarily to social systems in which constituent elements are individuals and which are based on voluntary association. In Warren's interorganizational field model, emphasis is placed on how community decisions are made and how large-scale public programs are initiated and maintained over time. The ecological system model is characterized by interdependence among its parts rather than by interaction. Illustrations of planning problems to which each model can be applied are noted, and a discussion on each model's advantages and disadvantages is provided.

Social Welfare Planning: Issues, Values and Policy Directions. Summary Report.

Abraham Monk, Sylvia Ospina, Martin Bloom, and Stanford L. Kravitz.
State Univ. of New York, Buffalo. School of Social Policy and Community Services.
Sep 72, 49p
SHR-0000163 Available from NTIS, PC$4.50/MF$3.00.

A study of contemporary social value systems is reported which is intended to provide a philosophical background to the issues and tasks of the New York State Temporary Commission to Revise the Social Services Law. The summary, part of a larger study, stresses the impact of social change on the character of domestic institutions, the Nation's conception of poverty, and the changing pattern of social responsibility. Social values are examined in terms of their subjective nature, the differences between supreme and practical values, and the origin and transmission of values in the American system. The relationship between social values and social services is noted, and it is stated that social services are meant to facilitiate the transition of things from what they are to what they should be. A definition of the four levels of poverty is given, and government's involvement in alleviating poverty problems is discussed. Family life in the U.S. is examined, and factors that impact on it are outlined. Community problems and some voluntary solutions to them are reported, and it is suggested that only a National commitment to invest up to two and one-half trillion dollars over the next 20 years will save the cities. Problems concerning the delivery of social services are described, and recent approaches to remedying defects in the social delivery system are reviewed. It is concluded that five broad areas of special interest for the policy-maker emerge. These are: control and participation; allocation of resources; area covered by services; coordination; and the relationship of income maintenance programs to services.

State Experiences in Social Services Planning. Eight Case Studies on Social Services Planning in Response to Title XX of the Social Security Act.

Gerald T. Horton and Edmund H. Armentrout.
Research Group, Inc., Atlanta, Ga.
Jul 76, 521p Executive Summary available from PROJECT SHARE.
SHR-0001180 Available from NTIS, PC$15.25/MF$3.00.

Eight case studies of social service planning by States in response to Title XX of the Social Security Act are reported. The passage of Title XX in 1974 specifically required each State and the District of Columbia to prepare an annual program plan for human services. The response of eight States to this legislation is examined with regard to: how they approached planning activities, what planning techniques and research methods they used, and how these techniques and methods have been organized within social service agencies. The case studies emphasize: the organization and staffing of planning efforts, trends in organization and staffing, needs assessment efforts, the identification of resources and services, the establishment of goals and objectives for social service plans, the allocation of resources, the development of programs, coordination activities with other agencies, the format and preparation of plan documents, and public review and comment. The major portion of the document is comprised of detailed case study in-

formation on social service planning in Massachusetts, Minnesota, Nevada, New Jersey, North Dakota, Oklahoma, Texas, and Washington.

State Planning for Human Services in Rhode Island.

Grace J. Beiser.
Rhode Island Statewide Planning Program, Providence.
Jul 75, 82p
SHR-0000646 Available from NTIS, PC$6.00/MF$3.00

State level planning for human services in Rhode Island is described, including the application of human services planning and delivery concepts. Organizational patterns involved in services integration are outlined, as are such considerations in the delivery of integrated human services as: regional delivery patterns, budgetary ramifications, and the role of the Governor. Integration-enabling legislation and integration mechanisms are also considered. A history of the human services reorganization effort in Rhode Island provides the background for a description of human services in the State. An overview of the State's human services departments includes the following elements: social and rehabilitative services; mental health, retardation, and hospitals; education; economic development; employment security; and corrections. It is concluded that: there is an awareness among State agencies of the importance of coordination in human services planning and delivery; human service agencies use a variety of ways to further coordination; and human service agencies recognize a need for improved coordination and management. Areas of concern involve: regionalization, purchase of services, personnel, data systems, funding, and community-based services.

Steps Towards the Development of a Community Capacity for Planning in Human Services.

Syracuse Office of Federal and State Aid Coordination, N.Y. Syracuse/Onondaga County Services Integration Project (SIP).
1976, 27p
SHR-0000756 Available from NTIS, PC$4.50/MF$3.00

Progress of the Syracuse/Onondaga County (New York) Services Integration Project toward the development of a community capacity for planning in human services is documented. The project's objectives are the development and establishment of a data bank for human services, located and structured in such a way as to assure its continued quality and use. Community input during the developmental period comes from three task forces in the areas of health, education, and social services, and from additional ad hoc groups. The data bank initially will have three files: (1) comprehensive data on community services; (2) information about the clients and their service needs; and (3) information from followup on referrals, indicative of the degree to which needs are met. The services information system represents the first component of the data bank. Services information is indexed, updated on a monthly basis, and placed on microfilm for use in six demonstration sites in the community in support of information and referral activities. When fully operational, information will flow back and forth between providers and the data bank for their mutual benefit — raw data to the data bank, and processed data back to those planning human services. The report includes summaries of activities related to the development of a service taxonomy and of agency profiles, indexing, data collection, and site selection for microfilm readers. As of spring 1976, the project was responding to seven or eight requests for services information per week. The cost of a single services information system update is estimated at $433.95. Schematic illustrations and supporting data accompany the text.

Studies in Social Policy and Planning.

Alfred J. Kahn.
Columbia Univ., New York. School of

Social Work.
1969, 337p
SHR-0000602 Available from the Russell Sage Foundation, 230 Park Ave., New York, N.Y. 10017.

Issues and problems in social planning are illustrated in a series of case studies presented as a companion volume to Theory and Practice of Social Planning, in which a conceptual framework of social planning is developed. The studies cover a diversity of planning fields: poverty, delinquency, urban planning, developing countries, general social services, community mental health, and income maintenance. The focus shifts from central government to national voluntary association, from State government to city government, from city government to the neighborhood, from official to unofficial planning unit, and from planning officials to self-appointed planning advocates. In some instances, emphasis is on the tasks, or problems to be solved; other case studies illustrate aspects of policy or programming. Intergovernmental relations in planning are demonstrated in an examination of community mental health programs. Both specialized planning for social programs or fields and the social aspects of more general or comprehensive planning efforts are considered. An introductory chapter describes the rationale behind the selection of the case studies presented. The closing chapter speculates on the future of social planning. The companion volume is available as SHR-0000603.

Study Design for the Maryland Human Resources Plan.

Maryland Dept. of State Planning, Baltimore.
Aug 73, 59p
SHR-0000185 Available from NTIS, PC$5.25/MF$3.00.

A work outline for the preparation of the Maryland Human Resources Plan is presented, which includes an analysis of current conditions and problems, a statement of achievement goals, recommendations for policy direction, and a recommended planning process. The plan, which was scheduled for completion in 1975, is designed to focus on the needs of people as individuals, families, and members of the community, and the role of the State in meeting those needs. Areas to be addressed by the plan include: health and illness, learning, public safety and order, social mobility and employment opportunity, income and poverty, and housing and the living environment. Phase I of the work outline involves program inventory, citizen participation input, data collection, and conditional trend analysis. Phase II deals with the preparation of goals; Phase III with actions to be recommended to the State; and Phase IV with planning process recommendations. A description of the work to be completed and objectives for each phase are provided. A methodology is also proposed for identification of planning/implementation responsibilities for the various State agencies and various levels of government. Portions of this document are not fully legible.

Summary Statement on the Human Services Information System (HSIS) Project of Lancaster County (October 1972-July 1974).

Human Services Information System Project of Lancaster County, Pa.
17 Jun 74, 26p
SHR-0000107 Available from NTIS, PC$4.50/MF$3.00.

The Human Services Information System (HSIS) Project of Lancaster County, Pennsylvania represents an effort to develop information and planning capabilities necessary for effective coordination of all public and private service agencies in Lancaster County. The project stresses coordination in five areas: direct service programs, service - supportive programs, planning programs, administrative programs, and information programs. Benefits to be derived from a coordinative system include: (1) greater guaranties to clients that total needs will be identified and met; (2) greater

capability for prevention of recurrences of major problems; (3) greater accessibility of services; (4) more efficient performance by service professionals; (5) more efficient processing and use of information; and (6) cost savings and avoidances of duplicate costs. Key recommendations based on the findings of the HSIS project are to implement better coordination among the 180 direct service programs by initially implementing the information, planning, supportive, and administrative system programs. Anticipated outcomes of such implementation include the following: that services will be more accessible through coordinated outreach and transportation; that coordinated case management, information and referral, and updated service directories will link the client to the appropriate service; that coordinated planning will bring about defined divisions of responsibility among agencies and programs; and that service professionals will be able to perform more service activities and less planning, information and administrative activities. The project approach and results are outlined and a statement by the Secretary of HEW is appended.

Systems Design Plan: Proposed Goals and Components for the Five Functional Areas of a Service System.

Council of Planning Affiliates for Human Services of Lancaster County, Lancaster, Pa.
Feb 75, 27p
SHR-0000435 Available from NTIS, PC$4.50/MF$3.00.

An overall service system planning framework is presented that also can serve as a checklist for establishing priorities in determining coordination requirements. Five functional areas are identified, each with its own goals and components. These include: the service-supportive functional area; and the functional areas relating to information, planning, administrative services, and direct services. Some of the goals encompassed in these areas are: identification of the total needs of the client; maintenance of current and accurate files according to a defined level of specificity; provision of a series of yearly reports; program budgeting and allocation guidelines; and provision of service to remedy problems or need in basic physical and mental health. Some components of these functional areas include specific services such as outreach, case-management, information and referral, and transportation. Others relate to compilation of data concerning resources, clients, community, budgeting and accounting, income maintenance, and rehabilitation. Capabilities for program review and evaluation are shown to be needed, as are a systems design component, and components for program budgeting and accounting, Federal/State relations, and staff and volunteer recruiting and training. It is suggested that the goals can serve as a starting point for establishing more specific goals related to each component area, as well as evaluating the overall efficiency and effectiveness of any service system.

Theory and Practice of Social Planning.

Alfred J. Kahn.
Columbia Univ., New York. School of Social Work.
1969, 361p
SHR-0000603 Available from the Russell Sage Foundation, 230 Park Ave., New York, N.Y. 10017.

Problems to which social planning is addressed are discussed and a framework of social planning concepts is developed, based on the argument that fact-finding, scientific perspective, and analysis, when combined with efforts to discern public preferences and values and when subjected to interest group pressures and democratic decision-making, can be useful tools in coping with social aspects of the environment. Special attention is directed toward clarifying the major phases in the planning process: definition of the task, policy formulation, programming, evaluation, and feedback. The book describes how planning can succeed or fail at any one of these stages and how planners cope with issues of fact and value. The effectiveness of the planning, programming, and budgeting system (PPBS) and of cost-effectiveness analysis in social planning is considered, and various planning structures are assessed.

Social planning as discussed herein ranges from social aspects of comprehensive planning to the interrelating of social and physical plans, and is concerned with traditional income maintenance and social welfare programs, as well as with social problem-solving and community mental health. The various roles of social planners — neutral technician, advocate, interest group representative, and public official — are examined. The planning framework which emerges in the final chapter is based on constant feedback, emphasizes process more than final reports, and produces medium-range programs more often than master plans. A companion volume, Studies in Social Policy and Planning, offers detailed illustrations of the concepts developed. The companion volume is available as SHR-0000602.

Ties That Bind: HEW Management Planning Study.

Department of Health, Education, and Welfare, Seattle, Wash. Region X.
1976, 87p
SHR-0000719 Available from NTIS, PC$6.00/MF$3.00.

A national study of planning was conducted in 1976 by the Region X Office of DHEW, centered in Seattle, Washington, to evaluate those DHEW programs for which State and/or local governments are the grantees. The study covered 54 DHEW programs (46 formula grant programs and eight project grant programs in health, education, income maintenance, and social services) representing 91 percent of DHEW funds going to State and local governments. The impact of Federal regulations on grantee planning and management is analyzed. A detailed evaluation of statutes and regulations is presented, plus the results of interviews with the human resource administrators of State and local governments in 10 States (one per region). Ten problem areas in Federal requirements are addressed which have an adverse effect on the rational allocation of resources to needs. The statutory and regulatory genesis of these problems is detailed, solutions to the problems are recommended, and a tentative implementation plan for recommended reforms in DHEW programs for which State and/or local governments are the grantees is presented.

Title XX: Administering Programs to Serve People.

Gerald T. Horton and Edmund A. Armentrout.
Research Group, Inc., Atlanta, Ga.
1975, 23p
SHR-0001158 Available from Research Group, Inc., 1230 Healey Bldg., Atlanta, GA 30303.

State planning efforts under Title XX are reviewed, and issues associated with the delivery of Title XX services are discussed. Nine factors are considered to be of primary concern to States: organization for planning and service delivery, development of agency program goals and service objectives, needs assessment, coordination with other agencies, program development, resource allocation, public review processes, plan format, and monitoring and evaluation. Each of these factors is detailed. Title XX requires that a State describe how the needs of its citizens in all geographic areas are considered in the development of a service plan. Regulations implementing Title XX require that a State show how the results of its needs assessment are used in the development of a service plan. Three major components in program development are listed: (1) determination and description of services to be offered; (2) determination of individuals to be served and fees to be charged; and (3) determination of the geographic distribution of services across a State. The approach taken by States in the allocation of Title XX funds is viewed as a primary determinant in how human services planning is accomplished. The Title XX planning efforts made by States are assessed, based on their comprehensive annual service program plans published by October 1, 1975. Prepared for the American Public Welfare Association National Round Table Conference, New Orleans, La., Dec. 16-19, 1975.

Travis County Mental Retardation Ser-

vices Plan of the Travis County Mental Retardation Planning Council.

Austin/Travis County Mental Health-Mental Retardation Center, Tex.
Sep 72, 69p
SHR-0001677 Available from ERIC Document Reproduction Service, P.O. Box 190, Arlington, VA 22210 as ED 101 507.

A plan for the provision of comprehensive human development and maintenance services for mentally retarded residents of Travis County and Austin, Tex., is presented. The plan, which reflects 9 months of needs assessment and planning by 12 human service agencies, is based on principles of human ecology (i.e., the right of all persons to opportunities for maximum development), normalization, and community responsibility for all members. Where possible, the plan attempts to supplant institutional services with community-based services. Major services are grouped into three categories: education, rehabilitation, and curative services; maintenance services; and prevention services. Within each category, specific services are defined; information is presented on the population to be served, existing services, service needs, and primary agencies responsible for service delivery, management, and funding; and recommendations are offered. Implications of the plan are summarized for each participating agency, and a schedule for implementation is outlined for 1972 through 1979.

Urban Planning and Social Work: The Professional Linkages. An Annotated Bibliography.

Barbara Rosenthal and Hillorie Salomon.
Jul 75, 20p
SHR-0001466 Available from Mrs. Mary Vance, Editor, Council of Planning Librarians, P.O. Box 229, Monticello, IL 61856, Exchange Bibliography No. 841.

Urban planning literature relevant to social work is cited in a bibliography compiled with a view toward the relevance of certain aspects of urban planning for social workers interested in creating community change. Annotated references are listed under the following topical headings: advocacy planning; citizen participation; program evaluation; social planning; and application of a social work model to planning theory. The references are drawn from the planning literature, the assumption being that social workers are familiar with planning concepts in social work literature. Approximately 70 articles and books, published in the 1960's and 1970's, are listed.

Use of Data for Human Services Planning and Administration in Federal Region VIII.

Ellen L. Slaughter, Parker T. Oborn, and Cynthia C. Cook.
Denver Univ., Colo. Center for Social Research and Development.
Sep 75, 67p
SHR-0000389 Available from NTIS, PC$5.25/MF$3.00.

Results are reported of a survey designed to identify ways to assist the planning process by the continued development of the Social Indicators Project data bank for planning Region VIII, which consists of Colorado, Montana, North Dakota, South Dakota, Utah, and Wyoming. The survey was addressed to comprehensive planners and fiscal analysts as well as to human service planners and administrators in five program areas: health, education, welfare/social services, employment/manpower, and criminal justice. Three broad areas of concern were covered: current data usage, additional data needs, and desirable forms of data presentation and analysis. The survey questionnaire focused on the use of socioeconomic data as input to the specific kinds of decisions which planners are required to make. It is suggested that the survey results can be used to identify gaps in the data bank, to help select appropriate statistical techniques for refinement of the data, and to improve methods of presentation and distribution of the results. Methodology is presented, and the characteristics of the respondents and their use of data noted. Data use and data

needs are discussed by category, and preferred geopolitical units and presentation formats are summarized. Conclusions and implications relating to the information collected on respondent characteristics, data use and need, and respondents' general comments about the data are presented, and the planner survey instrument is provided.

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